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ABSTRACT

This volume is a guide for new college admissions recruiters and their supervisors. Chapter 1 discusses office space and related policy and telephone and computer equipment use as well as other important practical information. Chapter 2 discusses the recruiter's duty to become completely informed about his/her institution in various categories. These include: environment; history; academic divisions; unique qualities; the institutional goals, mission or philosophy; profiles of the typical student; career options; and standard questions asked about the institution. Chapter 3 discusses how recruitment activities fit into the larger concepts of marketing and enrollment management as well as personal values and their relation to professional ethics. Chapter 4 looks at the variety of tasks a recruiter may encounter: visiting high schools and conferences, working with office teams, committee assignments, meetings, delegations, time-management, interviewing and counseling, and event planning. Chapter 5 deals with skills for travel assignments and covers making arrangements, necessary materials, airlines, rental cars, hotels, and returning to campus. Chapter 6 discusses the school visit and includes a travel checklist, recruitment presentations, and follow-up. Chapter 7 offers final advice on appearance, personal relations, work quality, networking and mentoring. Includes a glossary and statements of ethics. (JB)

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RAINING NEW ADMISSIONS RECRUITERS:

A Guide for Survival and Success

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Roger M. Swanson and Christine Kajikawa Wilkinson

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TRAINING NEW ADMISSIONS RECRUITERS

A Guide for Survival and Success

Roger M. Swanson and
Christine Kajikawa Wilkinson

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Foreword

CASE is pleased to present our newest book, *Training New Admissions Recruiters: A Guide for Survival and Success.* Authors Roger M. Swanson and Christine Kajikawa Wilkinson bring to bear their many years of experience in the area of admissions in preparing this guide to student recruitment. The book will not only benefit those entering the field as new professionals, but will also be of great value to those responsible for training and supervision.

It's important to note that the goal of this book is not just to help in the numbers game: obtaining more and better students for your institution. Rather, the authors emphasize what should always be the purpose of admissions recruitment:

> More than just promoting your own institution, you are helping people determine what they want and where they can best find it.... Your primary role [is] to align the cost-benefits of a degree from your school with the values, needs, and interests of your prospective students and parents and to help ensure an effective fit between what you offer and what they want.

This matchmaking role requires that you know and understand your own institution and that you be able to communicate this understanding effectively. This book will help you do that.

First and foremost, you need information. As the authors say, "You have a lot to learn—and fast!" They cover what you need to know and how you can go about learning it. Your need for information will be most apparent as you begin to make the school visits that are such a big part of your new job. This is where you will hope to do your best matchmaking work—helping students clarify what they want from an institution and whether what they want is what you offer.

Roger Swanson and Christine Wilkinson have both received the CASE Crystal Apple award for excellence in teaching, and the clear and readable style of this handbook attests to their skills.

I am confident that both new professionals and those responsible for their training and supervision will benefit from *Training New Admissions Recruiters: A Guide for Survival and Success.*

Peter McE. Buchanan
CASE President
August 1993

Preface

As a new college admissions recruiter, you are beginning a career in an exciting, challenging, demanding, and rewarding profession. Naturally you want to succeed, especially if this is your first "real" job out of college, and you want to start out knowing as many of the do's and don'ts as possible.

The problem is that many admissions offices are extremely busy and new staff may be hired at times of peak activity, so you may not have a training program available right away that would best prepare you for your new job.

The great news is that this book is written for people exactly like you. *Training New Admissions Recruiters: A Guide for Survival and Success* attempts to put in one place the kind of advice, tips, and ideas about "what works" that you might obtain from a comprehensive training program or professional seminar—or from years of difficult, on-the-job, trial-and-error experience.

We try to help you survive your first days, focusing on priorities to make them as valuable (and painless) as possible. We then move to "must know" information about your institution that you will be able to put together from sources on your campus. Once you've caught your breath, we spend some time with background information to help you see how your knowledge and job fit into the larger marketing and enrollment perspective.

As a staff member, you will have a variety of assignments that require different skills and knowledge, so we try to discuss how best to fulfill these new roles. One role in particular, that of the roadrunner, takes two whole chapters in which we cover travel savvy and effective school visits.

Finally, as you are developing a sense of your job and your goals, we encourage you to look outward in terms of relationships with your boss, co-workers, and networkers, and to look forward to enhancing your own career options and opportunities.

The topics are arranged in the order in which you are likely to deal with them, and the style is direct and results-oriented. While starting a new job or career is never easy, and you will certainly have to translate much of what you read to your specific institutional culture, our goal is to offer ideas that work and that we hope will contribute to both your immediate survival and your long-term success—in admissions or whatever career path you choose.

Roger M. Swanson
San Luis Obispo, California

Christine Kajikawa Wilkinson
Tempe, Arizona
August 1993

Chapter 1

You, the New Admissions Recruiter

Congratulations! You are now a bonafide admissions professional....but now what? Let's see if you have been given the basic tools for success. Often the people who hired you are so happy that the hiring process is done and they no longer have to do your job as well as their own that they don't give another thought to your survival. You may be fortunate enough to join a group that offers new staff orientation as a formal part of training and that designates someone to be your partner for the first couple of months. However, if that is not the case, you can learn the essentials on your own. This chapter will help guide you through that initial maze.

Before you begin to learn the basics about your institution, you should learn about the basics of your own survival within the office. Your immediate office environment is a good place to start.

Office space. If you have your own office—no matter how big it is and whether or not it has windows—be happy. Begin organizing it quickly so that your work space will look and function the way you want it to. The first week will probably be the last "free" time you have to do this, so take advantage of it. If you are given a semi-private area within a modular configuration, you can personalize this area as well, but avoid being too showy as your space should blend into the overall office decor. Further, you may be interviewing people in that area, and you want them to feel comfortable, not as if they've just entered an alien territory with objects swinging from the ceiling and partitions. If you share an office, find out which is the common work space and which is yours. This will save many traumas later on.

Supplies and equipment. Determine the office policy regarding these. What type of inventory control is there? Are you responsible for notifying others when you notice that supplies are low? This is particularly important in an admissions office because your supplies include numerous types and quantities of recruitment materials (brochures, form letters, contact cards, etc.). Without proper inventory control, you could find that the brochures you had planned to take for a week of recruiting are completely exhausted without any alternative on the horizon.

Admissions representatives, as a stock in trade, must possess hundreds of business cards to distribute to prospective students, parents, friends, and so on. Be sure you know what the institutional policy is on the use of these and what information should be included. Today, FAX, toll-free 800 numbers, and computer network (e.g., BITNET, INTERNET) addresses are included on business cards. Some recruiters include their home phone numbers to demonstrate their personal commitment to prospective students.

During your first week or so, find out if there is an inventory of equipment within admissions, or must it be requested from another department? Timing will be critical when you are planning your first set of visits and/or presentations. Never take for granted that the equipment you need will be available or that it is functioning properly. Always request that the equipment arrive a day or more ahead of time if at all possible, and try it out. Each machine has its own idiosyncracies, and it's better to learn how to change that bulb before you leave than to struggle with it while 50 students are watching and the clock is running.

Telephone. The telephone can be one of your best allies in recruitment. Determine whether you have a private line or are part of a general access number. Who will answer the phone—you or a secretary? When you're out of the office, will you be a part of an electronic messaging system? If so, learn its full potential. Can people leave you messages and can you access the system while you are off campus? Learn what the messaging system can do. For example, while you're on the road, can you use the system to dictate letters that will be sent before you get back to campus? Can you leave messages for people on a distribution list, forward messages, and so on?

Find out the most cost-effective way to stay in contact with your office while you are on the road. Should you use a telephone calling card, the office 800 number, or call collect?

Computing environment. Does your department use personal computers (PCs) extensively? What software is standard in your office, and are you familiar with it? If your department uses PCs and you are not familiar with the particular word-processing software used, request training immediately either through a class, tutorial provided on the PC itself, or through individual instruction by the top secretary. With institutions downsizing and using technology to offset staff support, you should be as proficient as possible with word processing. Also, be sure that you obtain formal security access to all the specific screens in your student information system that you will need to carry out your duties, and gain update capability on those screens where you will need to input or modify information. Simple as it seems, security clearance can often take more time to get than you could imagine.

Does your institution have an electronic mail system? If so, get some training immediately. In order to maintain communication with the people critical to your success, you will need a working knowledge of this system as soon as possible.

Is your admissions system on a mainframe? Are any of the data downloaded to a local area network (LAN)? If you have a prospect tracking system, how does it work and what is included? Learn all the basic screens, and have someone walk you through the different applications so you can learn how to use them. These learning tasks related to the computer may seem daunting at first, but you will soon find yourself performing them routinely—and they are critical to your survival and success.

Information important to your success

Once you have settled into your work space and learned the basic operating procedures of your office, you need to find out about the institutional policies that will govern you. Familiarize yourself with the overall campus rules and regulations related to the behavior of professional staff. Learn early, preferably before you are hired, what the vacation and sick leave policies are, and complete the paperwork for all your benefits, insurance, income tax, etc., as soon as possible. Pay *special* attention to your institution's travel policies (more about this below). This is an area you don't *ever* want to be creative about interpreting. Follow the policies carefully and err on the conservative side if necessary. Make sure you understand and comply with policies relating to liability for you and for the institution.

Now that you are settled, you should begin learning more about the institution you are representing. For prospective students and their families, you are your institution. Request all the printed material that the office sends to prospective students. Be sure to include any forms and computer-generated mailings as these types of correspondence are more likely to be confusing to students than the glossy materials sent from the marketing side of the institution. Unfortunately, the processing staff aren't always aware of what the recruiters are doing and vice versa, so messages may be unintentionally contradictory. Of all the written materials, the two you should know comprehensively are the viewbook and the college catalog. See Chapter 2 for more about the institutional knowledge you will need to master before you "hit the road" or begin to interview.

If your institution has a training manual for recruitment, you're in luck. If not, start compiling information you will need to know about the colleges and/or departments. Perhaps you will become the information specialist for the office—and that will help you become better acquainted with other key contacts in the academic departments and colleges.

The "big three"

Memorize the standards and processes of the "big three"—admissions, financial aid, and housing (as outlined in Chapter 2). Introduce yourself to the department directors and/or professional staff in these areas and find out who your primary contacts will be. These people will become more important as the recruitment cycle progresses. You should also ask for an office tour and mini-orientation to their departments. This will not only give you a better working knowledge of their operations, priorities, and issues, but will also sensitize you to their needs and concerns.

While you are a part of admissions, don't take for granted that everyone knows the total picture. Learn for yourself about the admissions standards and what the grey areas are. Learn where there is flexibility in the admissions process. Who has the authority to make those decisions? What authority do you have in any of the admissions decisions? Each institution has some kind of appeal process. Learn what this process is, and if you are not part of it, see if you can observe one or more of the appeal review meetings to help you work more effectively with applicants.

Learn the terminology of the profession and how it relates or doesn't relate to your particular school. Common terms are included in the Glossary at the end of this book, but your college will probably have some unique ones (including acronyms) which you will want to master.

If your campus has residence halls, it is vital that you tour the halls. You will be asked about them, and you should be able to speak from firsthand knowledge. Learn who lives in which buildings (e.g., women only, transfers, special interest) and what educational programs are available along with the services provided. Is on-campus housing required for any particular students? Should students apply for housing before or after admission? Is there a housing application fee and a separate deposit for housing? What are the policies on alcohol, smoking, male/female arrangements, etc.? How does the prospect apply?

After you have given several recruitment presentations, you should make a list of the most commonly asked questions about the halls and prepare the appropriate responses. Have someone from the residence life office check the information for accuracy.

For recruitment purposes, find out what the policies are for taking prospective students through the residence halls. Can they stay overnight? If so, is this possibility publicized? How much does it cost and what type of service, if any, is provided?

Prospective students ask about financial aid as frequently as they ask about admissions. One of your responsibilities is to translate financial aid into lay terms and to reassure prospective students and their parents that they can get through the process—with assistance from staff if needed. Financial aid is a subject often surrounded by misinformation and anxiety and complicated by the fact that each institution has its own policies and procedures in addition to what the federal and state governments may require of applicants.

What materials does the financial assistance office send to students and in which recruitment events does it participate? As you did for on-campus housing, take notes of the most frequently asked questions and prepare an information sheet for you and others to use.

Every applicant and parent hopes for a scholarship. Be sure you know who makes the decisions on scholarships and what types of scholarships your institution offers. Are scholarships based only on merit or on financial need as well? Be very careful about what you say on this subject: *Never* promise a student a scholarship unless you have the authorization to do so.

The office and you

Even though you were hired for a specific set of responsibilities and tasks, you will still be part of a larger office operation which you will need to immerse yourself in and understand the fuller perspective. How you interact with other colleagues and are seen as a contributing member will be vital to your positive transition into the office and your future.

Office organization. Obviously, you will need much longer than a week to understand the full culture of your particular admissions office and how it functions. However, you can learn some aspects early and quickly. Ask your supervisor for some time to understand how your particular role fits into the larger office structure. Find out which positions are most like yours and which staff members

you will be working with most often. Ask for an organization chart to see who does what and how formal relationships are aligned. (Then, as time goes on, observe how the *informal* structure really works!)

How often are staff meetings held? What type of format is used—informational, topical, issues, problem-solving—all or none of the above? What is the style—presentational, formal or informal, factual or anecdotal, listening or sharing, focused (or agenda items) or free-flowing, long or short, "round-robin," etc.? When would you have regular standing meetings with your supervisor? It is important to maintain communication and receive feedback, especially during your first year on the job.

You should receive an orientation to the comprehensive division of which your department or office is a part. It may be Enrollment Services, Student Affairs, Academic Affairs, or some other combination. It's important to realize that you are not operating in a vacuum. Understanding how your office fits into the larger organization will help you understand the priorities and strategies of the office.

Staff support. Will you have a secretary or is there a secretarial pool? How long does it take for a document to be finished once you have given it to a secretary? Is that fairly constant or does it vary depending on the time of year? How long does it take mail to get off campus?

Are there student assistants who help with the preparation and follow-up for recruitment trips? The general recruitment plan for your office should include the major recruiting seasons when a number of people will be preparing packets of information. Be sure that you are included in that plan and find out what your specific assignments will be and what special needs you will have for your particular trips.

Now you're ready for the next step: You're off the starting blocks and on the right track.

Chapter 2

Your Institution: Learning the Basics

Becoming a Campus Expert: So Much Depends on It!

Vital to the success of anyone new to the job is gaining the knowledge required for it. As a new college admissions recruiter, you have a lot to learn—and fast! First and foremost, a campus representative is expected to be knowledgeable and thoroughly informed. The only thing worse than not knowing the answers is giving wrong answers. Faking it and making errors destroys your credibility and can result in students making bad college choices. You can't afford either.

If you are an alumnus of your institution, you have already stored a lot of useful information in your memory. However, do not be lulled into a false sense of confidence, but remember: You will need to know a lot more; you will need to know how to use your knowledge in new and different ways; and you will need to keep up with the inevitable changes.

Consider setting yourself a one- to three-month goal: mastering most of what you need to know about your institution. You can pick up a great deal through OJT—on-the-job training. And remember, nobody knows it all, because "it" changes constantly, and updating is as important as committing the information to memory in the first place.

To speed up your ascent on the learning curve, read and reread all of the literature that you, as a recruiter, distribute to prospective students and parents. Concentrate on admissions training manuals provided by your new office. If your school catalog is reasonably up-to-date (although most catalogs are out-of-date by the time they are printed), focus on learning as much of its contents as you can. In the same way, review the class schedule information until you know it practically by heart. Check into any materials put out by your public affairs department as well. And constantly ask your admissions colleagues and supervisor about areas you don't understand or would like to know more about.

As your "college knowledge" begins to accumulate, you need to develop strategies for applying it in presentations, interviews, letters, telephone contacts, publications, and so on. Your supervisor may be able to provide you with an

outline for making general presentations. You will still want to customize your delivery to the audience, location, time of year, and purpose (more on this in Chapter 6).

A good way to learn both content and form is to observe other staff members in on-the-job settings. Ask to sit in on their interviews, listen to their presentations, and go on their campus tours. Debrief afterwards with questions about what they did and why they did it. If possible, observe several different people so that you can experience a variety of styles, approaches, and adaptations. Then ask these same colleagues to review and critique your performance. No one enjoys being criticized, but it's better that it be done by friends and colleagues than by students, parents, or high school counselors.

Some of the information you need to master will be straightforward, unique to your institution, and easy to remember. Information about your institution's location, mission, and founding may fall into this category. Other items may require more inquiry or explanation, such as admissions policies, the 4-1-4 or block semester system, or the rule that freshmen can't live off campus. And some material you may just have to memorize, such as academic majors and minors, new freshman profile demographics, and costs and financial aid.

Listed below are several categories of institutional information that you need to know. Work to fill gaps in your knowledge base and update as needed.

Environment

Let's start with location. Where is your campus? Your geographical identity (state/province, town, specific section of a large city, rural area, etc.) helps people unfamiliar with your institution put it in physical perspective.

What can you assume your audience knows about your location? On the one hand, perhaps you are speaking to people from out-of-state who have no idea where your campus is or who know the name of the town but have never been there. Your media (viewbook, search piece, map, or overhead) should pinpoint your college's location within your state or province and city or town. If you are in the proverbial "middle of nowhere," help them understand your location in proximity to the nearest city, landmarks, points of interest, and airport.

On the other hand, if you are a regionally oriented school, most of the people you recruit have probably been on your campus for one reason or another. While you don't have to show them your "We Are Here" map, they may not know much more than its primary street or freeway coordinates. The in-town college or university always suffers from being taken for granted by locals who *think* they know a lot about it because they've been on campus for a basketball game or concert. You need to help these folks see the difference between visiting the campus versus enrolling as a student.

While location is a physical fact, it is more importantly a perceptual reality. For example, if your campus is 50 miles from a prospect's home, the student may feel it's too close while the parents may feel it's too far. An 18-year-old freshman may find an out-of-state school exciting and challenging; a 45-year-old transfer may find it difficult to commute to an institution just across town.

To one student, an urban location is "awesome"; to another, a rural site is appealing. A college on 5,000 hilly acres may be a delight to someone who loves

open space, but a turn-off to a student in a wheelchair who seeks a flat and compact campus. Individuals' reactions to mountains, desert, plains, and swamp vary, just as they do to the West, Midwest, East, North, and South.

As with many features of your campus, location and its specific attributes can be a recruitment plus or minus. Your job is to ensure that people understand as fully as possible what the location is really like and how it contributes to or detracts from the experience that enrolling students can expect. If your curriculum ties directly into some aspect of the city, ocean, woods, or country, you need to make that connection clear. Likewise, if crime in the city or boredom in the country is a concern, you need to show whether there really is a problem and, if so, what is being done about it. What prospects may initially perceive as a negative can become a positive when you show how your campus responds to it. You might brainstorm with fellow staff on creative ways to communicate campus deficiencies.

Location includes many elements, from seasonal temperatures and conditions to available transportation to cultural events. Especially for those who cannot visit, you need to offer a vivid and truthful image of your school's location, including what you perceive are its negative aspects. Media, such as brochure pictures and videos, should offer visual support.

Your location is partly a product of your physical campus. It may be liberal arts-traditional with an ivy-covered "Old Main" in the quad or urban commuter in a high-rise office building in a busy metropolitan area. It may be modern/high tech with new buildings and public art or architecturally themed with a Gothic or Spanish mission appearance. Buildings, landscaping, and other facilities (athletic arena, commons area, open space) not only create individual impressions on viewers, but also reflect the functions and priorities of a campus—the nature and importance of the programs they house or support. Is your football stadium an area landmark with its own off-ramp? Does one of your residence halls have its own ZIP code? Does the chapel dominate the quad?

As a new rep, take an objective look at your physical campus and its appearance in publications and videos. What messages does it send? Think about how they reinforce or contradict the recruitment messages your institution expects you to communicate. Listen to the messages prospective students feed back to you, and study any market survey or focus group responses that can help you identify what your physical campus "says" to visitors.

Important as location is in and of itself, it is also part of a larger concept called environment: What's it like to be a student on your campus? What do the students and faculty look like? How do they act? Prospective students want to know not only how students dress, but other factors such as age, gender, ethnicity, friendliness, and interests. What is the town-gown relationship? Do the students have lots of school spirit, and, if so, how can you communicate this energy and enthusiasm to prospective students? Are those who reflect cultural pluralism and diversity embraced and celebrated or are they made to feel like outsiders? Are academic freedom and the right to dissent encouraged or penalized? Are students important or barely tolerated?

A big part of your job is to represent "what it's like on my campus" to those who don't know or who have the wrong impression. You may not be able to change how they evaluate your campus's attributes in relation to their own value systems, but you can help by communicating and explaining the institutional

environment to the best of your knowledge and experience. Despite some blurring of objective and subjective, your job is to *interpret* the environment of your campus to those who may benefit from enrolling—or not!

History

Some colleges and universities emphasize their history because it forms an important part of their image and is part of their attraction. Others, perhaps founded more recently, downplay or exclude it. Determine early on the importance of your institution's history and how it figures in your campus presentation. Whether or not history is important to your institution, you should know the year of its founding, the significant events, and the people who made it what it is today; you should be able to connect its present and future with its past. Someone has probably written a book about the history of your institution, and reading it will provide you with many entertaining stories and anecdotes you can share with your audiences.

Important though the past may be, you want to emphasize the values that have developed through the years and that define your institution today. Your retelling of history is for the purpose of explaining "how we got to be what we are now." This gives future students an idea of what to expect in the coming years.

You will want to demonstrate how the values from the past are still present in the way your institution deals with the issues of today—career preparation, use of technology, and responsiveness to new knowledge, for example. Your prospective students are more concerned about their future than your past.

If your institution is undergoing a major redirection of mission, you owe your prospective students a clear sense of how and why the institution is diverging from its past and where it is hoping to go. This may be very difficult, but at the least you should alert them that such changes are under discussion and share whatever information has been approved for public consumption.

Academic divisions

Academic programs are the head if not the heart of colleges and universities. Their presence and quality are among the most highly rated reasons why students say they select one institution over others. Having certain majors gives you immediate entree to students seeking them; lacking certain majors allows you to cut other contacts short. Specialized schools whose missions are primarily technological or religious or in a narrowly defined academic field will build their image and recruitment strategy around this element.

Beyond your campuswide academic strengths, you need to know the major academic structural areas (e.g., colleges, schools, divisions, clusters) and key departments within those units. Knowing about graduate programs and how the institution prepares undergraduates for them will equip you to respond to far-sighted young scholars. Especially strong facilities in support of majors are a natural "brag" when you are promoting your academic strengths. Examples might be laboratory specialties and equipment, field experience opportunities (e.g., a state-of-the-art dairy or oceanographic vessels), and computer technology. But

watch your ethics here: Don't oversell these if they are not available to undergraduates or to freshmen.

The same is true for your faculty. You may want to be able to quote data on terminal degree holders and percentage of faculty women and faculty of color. Special awards earned for teaching or research, noteworthy faculty achievements, and faculty with regional, national, or international reputations are wonderful to describe. Again, will freshmen ever see them?

One question about faculty that is often asked concerns the faculty-student ratio. While you need to know what your institution's current ratio is, e.g., 1:15 or 1:22, you will want to offer a fuller response than merely numbers. What the question is really getting at is average class size and degree of individual attention students may expect to receive from faculty. For example, if you have a low ratio but many large lecture classes for freshmen, own up to that reality. You can balance it by commenting on smaller discussion groups or pointing out that larger lectures are taught by faculty who have reputations for teaching excellence. Have your answer to the "faculty-student ratio" question thought through before you are asked it. It provides you with opportunities to talk about a lot of related issues.

Even more useful may be anecdotal information supporting recruitment "messages." To convey the close faculty-student relationships on your campus, you might elaborate on faculty home receptions during orientation, one-on-one faculty advisement and mentoring programs, and opportunities for students to work side-by-side with faculty on research projects.

Where possible, students need to see and hear faculty firsthand just as they need to experience directly other elements of your campus environment. Having faculty meet prospective students away from campus (e.g., at "yield" events) enables them to share with prospective students and parents their excitement about teaching or research. As with any recruitment volunteers, faculty need to be selected and utilized carefully for maximum benefit (and possible damage control). On campus, visiting students who sit in on classes or see faculty in their offices or labs may find their experience so impressive that your institution moves up their scale from "also-ran" to "key buy."

To gain a sense of your institution's academic strengths and uniqueness beyond the "literature," find some opportunities to hang out with faculty. Sit with them at the faculty club or dining room, talk to them before and after committee meetings, go to some of their lectures and ask questions afterward, and perhaps even review some of their research and publications. Attending a faculty senate meeting can be revealing.

And ask your enrolled students for their impressions of faculty and programs. When you were a student, you knew who the best faculty were and why. So do the students on your new campus. Use their positive comments in speeches, interviews, and publications. Find creative ways to involve highly recommended faculty in your outreach activities.

Unique qualities

A common question you will be asked and to which your answer should be consistent with those of your colleagues is this: "What is so special about your institution that I should enroll there?" What a wonderful question! It offers you

a perfect opportunity to distinguish your school from the competition.

So what *does* make your school different and therefore of special value in the eyes of the prospective student and parent? Perhaps the uniqueness is a truly student-oriented faculty and staff, or a learn-by-doing, hands-on philosophy of education, or a combination of classroom-internship education, or a "Great Books" approach to learning, or a strong religious foundation, or a specialized academic focus (e.g., minerals and mining).

Your training materials should be able to provide you with some concise statements on the uniqueness of your institution. If they do not, then with the help of your recruitment publications or manual and your new colleagues, try to identify at least three very special qualities that make your school different and worth the value of your tuition. Use surveys or focus groups of your current students and faculty to confirm—or contradict—your conclusions.

The results of this exercise should enable you to make a clear and memorable impression on your recruits. If they remember nothing else, they should recall your institution's distinctive areas of excellence and difference. And those prospects who do not value the special qualities that your institution offers will understand that they should look elsewhere. Of course, you will want to make it clear that these distinctive qualities are not the *only* strengths of your institution, but that they are what you do best and why you attract the kinds of students you enroll.

Institutional goals, mission, or philosophy

How relevant is your institution's mission statement to your college or university today? An exercise at an annual meeting of directors of admissions from colleges in a midwestern state system sought to answer this question. One of the participants clipped out the mission statements from the catalogs of all the colleges represented. When the statements were pulled out of a hat and read, none of the directors could match the mission to the institution. Even more astounding, most directors could not even identify their own mission statements!

It's sad but often true that the goals, mission, or philosophy statement so laboriously developed by our faculty and administrators remains in the front of our catalogs, unread or disregarded. If this describes the situation at your institution, consider asking your boss to give you a statement that fits the situation of the institution today, or develop your own statement of goals, mission, or philosophy, but be sure to have it approved before you use it.

Many institutions in the '90s are going through major strategic planning processes. If yours is engaged in this exercise, you should participate in these activities or at least be informed about them and apply the results to your recruitment efforts. Integral to strategic planning is identification of institutional mission.

If your college or university already has a well-defined statement of goals, mission, or philosophy that permeates all elements of the institution, consider making this statement the centerpiece of your message. This will help define the uniqueness of your institution, differentiate you from your competition, and structure the focus of your message and your media.

Collect recruitment literature from other institutions and analyze it for expression of their purposes. See how they develop their core purposes and values

through words, pictures, programs, and procedures. Can you use what you have learned to strengthen your own materials and approach?

Many goals, mission, or philosophy statements are written in "academese" that is not well suited to public understanding or interest. How can you best *translate* the concepts in your institution's goals, mission, or philosophy statement into realities that prospective students, their parents, and counselors can understand? The answer is through vivid examples. Ask others (colleagues, students, faculty) about how they have experienced these concepts in action. Convey the idea through stories and anecdotes that are dramatic, exciting, and compelling. Learn from listening to presentations of your colleagues, and pick up useful examples from your own experiences on campus.

Admissions

One of the "big three" application processes (along with financial aid and housing), admissions is a major topic requiring attention and accuracy.

Some institutions may have policies that are fairly simple and straightforward. Many community and state/province colleges require only that applicants be high school graduates and/or have achieved a minimum combination of grade point average and test scores. More and more, however, institutions are defining specific "college preparation" course requirements for admission, as many selective institutions have done for a long time.

Other institutions, including selective publics and independents, have more complex standards, including different criteria based on level (e.g., first-time freshman, lower-division transfer, upper-division transfer), major, and so on. Would-be architecture or art majors may have to submit a portfolio of creative work, for example. And a variety of other criteria may be evaluated including quality and quantity of college preparation course work, leadership and extracurricular involvement, work experience, trend in grades, recommendations, interviews, and so on.

Exception and appeal policies make the admissions situation even more complicated to explain and defend. While these policies may not be covered in recruitment presentations or publications, you should know the answers to inquiries that are likely to come after college nights or in follow-up phone calls. Know what constitutes a valid appeal and how the process works. Draw a profile of what it takes to reverse a denial. Develop a diplomatic way to phrase comments about this process, but be very careful not to build up false expectations or promise more than your institution can deliver. And learn how to deal effectively with denied applicants, as well as their advocates, including parents, counselors, alumni, donors, legislators, and lawyers.

Once a student understands the criteria for admission, he or she needs to deal with the application process; this includes not only obtaining and filling out the application, but also factors such as the following:

- materials required in addition to the application (transcripts of academic records, recommendations, test scores);
- other requirements (interviews, application fees); and
- timing (deadlines).

Post-admission processes should also be made clear: when admission noti-

fication is likely to occur; when intent-to-enroll forms or enrollment deposits are due; how notification of aid and housing occurs (see below); the content and timing of early orientation, advisement, and registration programs; the dates due and amounts of fee payments; the opening of residence halls; the start of classes; and so on.

A full explanation of how admissions decisions are reached and the processes related to them is one of the critical informational elements of any recruitment effort. Study available materials and have colleagues walk you through the processes. This is one area where accurate and current detail is absolutely necessary. And don't forget to keep up on the changes!

Financial aid

Of all the areas you need to know about, financial aid is probably the most difficult to understand and communicate. The programs are varied, the delivery complex, the changes pervasive, and the accountability extensive. Federal and state province programs are dictated by off-campus legislative and executive bodies that constantly change programs, requirements, and funding—even in the middle of awarding cycles. Public and private auditors review program administration regularly and unannounced. Institution-based aid such as grants, loans, or scholarships is also subject to examination from fiscal officers and donors.

While you will need to be an expert on admissions, you will want to determine early on how *much* of an expert you need to be in financial aid. Seek direction on this from your supervisor. At some institutions, you only need to know the basics, while at others with merged offices, admissions staff even serve as financial aid officers.

At the minimum, you will want to be familiar with the grants, loans, work and work-study, and scholarships available from your institution. You may need to memorize information on Pell grant awards, minimum self-help or family contributions, or scholarship eligibility requirements. And these will change annually, so keeping up-to-date is crucial. Your director may even expect you to do "quick-and-dirty" need analyses to offer aid estimates or to make conditional aid commitments in the field. You may be given some discretion in on-the-spot scholarship awards to specially targeted prospects.

The role of financial aid in recruitment is often underestimated. For the student or family with need, the amount of award may make the difference between attending your institution or going to another where the award is higher or the costs lower. For priority recruits—top scholars, members of certain ethnic groups, people with special talents such as music or athletics—the attractiveness of your aid package will often be the deciding factor in the decision to enroll. Spend some time understanding how financial aid is part of your overall recruitment strategy as well as how it works. A visit to the aid office and lunch with an aid officer may contribute greatly to your knowledge of this vital recruitment element. Identify early at least one reliable friend in your aid office to whom you can go for help on questions and problems.

Associated with financial aid are your institutional costs. These should be available in tables (on-campus and commuter students, dependent and independent) and show annual figures or estimates for the following:

- tuition and registration fees including special or additional fees;
- room and board (on- and off-campus);
- books and supplies (note differences in costs for specialized areas, e.g., art and architecture);
- transportation; and
- personal expenses.

Prospective students and their parents should be able to compare the total estimated cost of education for your institution with the "bottom line" costs at other institutions.

When you are discussing costs, in addition to explaining the aid available to offset them, you should emphasize the relationship of *cost* to the *value* of the educational experience your institution offers. Just as costs may vary greatly from community college to private college, so value as a perceived commodity plays a major role in college choice.

The consumer of any product or service asks: Is what I hope to get worth what I must pay? Unlike a toaster oven or carpet cleaning, higher education has a value that varies tremendously from person to person and can only be assessed over a lifetime. In other words, you are asking people to invest on faith—at least initially.

When you describe the value of a degree from your college or university, prospective students and parents must weigh this value against their own life priorities, costs (money, deferred income, years of hard study), and the vaunted costs and benefits of attending other institutions. While you cannot change the costs of attending your institution and you have only very limited control (if any) over financial aid, you are the primary sculptor of the image prospective students and their parents will have of the values of the educational experience provided by your institution.

As an admissions recruiter, *this is your primary role: To align the costs/benefits of a degree from your school with the values, needs, and interests of your prospective students and parents and to help ensure an effective fit between what you offer and what they want.*

Housing

Almost more than students, parents are extremely concerned about where their children will live while attending college. They have been responsible for the safety and security of their children all their lives, so extending that concern into the college years is natural. After the first year, these concerns may decrease, but they never completely disappear.

Colleges vary widely on the availability of on-campus housing and policies regarding it. While some schools (usually urban) have no residence halls and cater to commuting students, others emphasize their "living-learning environment" as a keystone of student development. On many campuses, freshmen are required to live in the residence halls for the first year or longer.

Because where students live can be critical to their success in college, housing options are part of the recruiter's stock-in-trade. What are the housing facilities on your campus like? Take a tour with one of your housing officers. Check out everything from recreational and study areas to the structural integrity of the building. This is not just to satisfy your own curiosity. You will be questioned on *everything*.

Can students hang posters and paint walls? Do costs vary depending on the hall or amenities? Where do residents park cars, and are the locations safe for both cars and people? What safety and security systems are in place (locks, peepholes, fire alarms, sprinklers, fire escapes, night desks)? How are rooms arranged and how big are they? How big are the beds (what size sheets will be needed)? What is supplied in the room (e.g., phones, lamps) and what may students bring? Are stereos, televisions, microwaves, and other appliances allowed? Are rentals such as mini-refrigerators available? Are rooms wired for computers and cable television? How are roommates assigned? Can roommate assignments be changed?

And, of course, the big questions: Do you offer coed arrangements and, if so, why? Are condoms dispensed in the residence halls or elsewhere on campus? Can students drink alcoholic beverages on campus or in the halls? How does the institution deal with infractions of rules?

Food ranks right up there in importance with housing. What meal plans are available and how much do they cost? Is the food good? That's a tough one, so seek input from students and then decide what to say. It's probably better to resist the temptation to be funny on this one: Remarks such as, "You can eat all you can keep down," or "The food is bad, but the servings are big," may not be amusing to the parents who must pay for it or the students who must eat it. Can students with restricted or specialized diets be accommodated? Does the dining hall offer specialties such as a deli bar, salad bar, picnics, steak night, ethnic foods, and so on? Can students cook in their rooms? Recent surveys show that students are not only interested in food quality, but also in variety and flexibility of food delivery systems, e.g., debit card use at facilities throughout campus, late evening (11 p.m.) servings or kitchen access, etc. Play up any special programs your school offers: Prospective students will "eat it up"!

If your housing staff has an active and comprehensive educational program, include this in your discussion of housing. Resident assistants, learning coordinators, or student development specialists may offer tutoring, counseling, leadership enhancement, crisis intervention, drug and alcohol abuse prevention, rape avoidance and victim assistance, etc. Academic or study skills courses may be offered in the halls. Some may have extensive personal computer availability, often with campus mainframe connectivity to access library catalogs, reference materials, e-mail, and the like. Whatever advantages you have, promote their positive impact on your students' educational and personal growth. More significant learning experiences may occur in residence halls than in classrooms.

Off-campus housing may interest your future students, particularly if your on-campus spaces are limited, or transfer and older-than-average students comprise your applicant pool. Because residence halls must be filled to meet budget and loan payoff commitments or to fulfill your mission as a residential campus, you probably won't want to promote off-campus options if your residence halls are not filled. For those students who do need off-campus housing, you should have a brochure or listing of rentals (including cost ranges) within easy walking or biking distance or bus ride of your campus.

As with admissions and financial aid, your prospective students need to know about the process for securing housing, including application, deposit, costs, deadlines, and payment plans (with or without meals). Should students apply for housing separately from admission; concurrently or after admission; with

deposit or without? Can students defer payments—with or without paying interest? Are contracts on a term or academic year basis? Can they be broken? What are the penalties? What are the refund policies? Can payments be made with credit cards? Which ones?

Because housing can be such an attraction for students and parents, you should explore how it is showcased on campus tours and through overnight visit programs. The admissions office usually runs these programs in coordination with housing. They can enhance your efforts, but they also involve time, organization, and risk. Your student recruitment volunteer program may complement this effort; enrolled students could host visiting students, share rooms, take them to classes, and make them feel welcome.

Special areas

Every campus has some special attractions that deserve spotlighting in recruitment presentations and publications. As you learn all about your new campus, take the time to develop a running list of your standouts such as the following:

- athletic programs;
- library holdings;
- computer access for students;
- honors programs;
- scholarships;
- student services;
- special events;
- activity programs;
- religious affiliations;
- leadership opportunities;
- cooperative education and internship options;
- new student orientation programs;
- TouchTone telephone registration;
- on-line degree completion checks;
- free bus transportation;
- study skills courses;
- student recreation center;
- on-campus hotel, airport, or stables.

You probably wouldn't make any of these the focus of your presentations and publications, but you should highlight their presence whenever you can. Any one of them could make the difference in the decision to apply or enroll.

Student profile

Prospective students want to know what your enrolled students are like; they want to see if they will "fit in," if they will find people like themselves on your campus. Your literature (especially pictures), videos, and campus tours should respond to this need. Your student volunteers can provide the best image of what your students are like, for they are the living, breathing, authentic embodiment of their counterparts on your campus.

Potential enrollees will also appreciate data on your undergraduate student body, including average age or age range, geographical origins, ethnicity, male/female ratio, undergraduate/graduate, international students, participation in student activities, percent receiving financial aid and/or working, on-campus/commuter populations, most popular majors, and so on.

Careers

Most students attend college to prepare themselves for careers or at least for their first "real" job, even though as freshmen many do not know what careers they want, what possibilities are available, or in what directions their interests might lead them. While they are interested in other outcomes of a degree (well-roundedness or personal growth, for example), a college education is clearly a means to the next step in life, whether it be a first job, graduate or professional school, additional certification training, and so on. Even liberal arts grads need to do *something* after commencement.

You will probably have some information on how well your institution prepares students for life after college. You may have a breakdown of numbers of graduates admitted to various post-baccalaureate educational programs or entry-level career positions, listed by majors, titles, companies, locations, and beginning salaries. You may want to contact or visit your career services or placement office for any information on what your graduates do and how well they do. Alumni success stories, recent and ancient, can bolster the message that attending your institution leads to success, both professionally and personally. And having successful alumni tell their own stories at recruitment events can be very persuasive.

Discussion of careers is also a good way to lead an uninterested or younger audience toward an understanding of why college is important. If you can "broker" timely information from magazines and books on current and future career trends, you can generate interest among people of all ages. Tying those directions into your institution's academic and developmental programs offers a strong "means-to-ends" argument for enrolling at your college or university. This is a good time to show how your career placement office assists students in securing good jobs and provides special services such as workshops on developing interview skills and effective resume writing.

Standard questions

During the question-and-answer period at presentations and interviews, you will hear a variety of questions that students ask about most institutions as well as many that are specific to your college or university. Your colleagues should be a good source for the answers to the majority of the following questions:

- How hard is it to get the classes I want to take?
- How hard is it to change my major?
- Do you have a major for undecided or undeclared students? (If your institution offers such a category, you enjoy a recruitment plus, as a fourth to a third of freshman applicants are undecided or at least uncertain as to choice of major and career.)

- Where can I get help if I need it? (This is a good opportunity to discuss academic advisement, counseling center, the college chaplain, and so on.)
- How safe is your campus, especially at night? (Campus safety and security is a critical issue. Federal legislation now *requires* institutions to provide specified facts on safety and security to prospective students if requested. Consult with your supervisor regarding current information or brochures, and remember that this will change annually.)
- Is your institution experiencing current campus problems, e.g., drug or alcohol abuse, AIDS?
- How large are the classes? (A good response is to describe typical first-term classes and sizes.)
- Is there a parking problem? (Most campuses have one—how can students deal with it successfully?)
- How good is the food? (See above.)
- What services does your health center provide and how much do they cost? (Some possible topics to discuss are: outpatient care, emergency hours, wellness programs, student insurance coverage and costs, hospital facilities, prescriptions, x-rays.)
- What kind of recreation and intramural programs do you offer? (Good programs and facilities are strong selling points.)
- What is your attrition-retention rate?
- What percentage of entering freshmen graduate in four, five, or six years? (This is a growing concern for cost-conscious parents and students. However, there may be good reasons why your students take longer to graduate; for example, reentry students attending part-time will proceed more slowly than full-time students.)
- Is this really a [party, nerd, jock, etc.] school?
- What is the weather like in winter, summer, etc.?
- How easy is it to get to or find your campus?
- What is the political climate of your campus?
- What is the racial climate of your campus?
- How many international students are enrolled?
- How does the campus relate to the community?
- How many volumes does your library hold?
- What percentage of your faculty hold doctoral terminal degrees?
- How many teaching assistants teach freshman courses?

Then there are the "hot questions"—those of great interest for a relatively short period of time. Every institution has occasional events or crises that grab headlines and capture the public's interest; unfortunately, these are as often negative as positive. You, your colleagues, and your recruitment volunteers need to know how to respond to these situations, whether positive (a Nobel prize-winner on your faculty, a championship football team, an enormous gift from an anonymous donor) or negative (incidents of racial harassment, charges of fiscal mismanagement or embezzlement, the firing of a popular faculty member).

Dealing with these hot questions (which will probably cool and disappear over time) requires accurate and timely information, tact, caution, and finesse. As with some of the questions above about potential campus "problems," interrogators are often as interested in how your campus is *responding* to the situation as they are in the situation itself.

Your role is to provide sensitive, fair, consistent, and honest answers without being defensive, arrogant, or hostile. Biting the bullet may be the order of the day until "this too shall pass."

Keeping up

One of the hardest tasks you have once you have mastered all of this information is to keep up-to-date. Something new is always happening, and you need to know about it, determine how you should modify your presentation in response to the new event, and what impact it may have on your audience.

This task is compounded if you are on the road many weeks at a time and the folks back home forget to tell you all that has happened since you left ("whenever that was"). You'll be in good shape if your boss accepts updating you as his or her assignment. If not, you may want to ask a colleague or support staff person to keep a running account of "what's new" for your review upon your return. Simply reviewing your collected student newspapers or campus newsletters can be very useful.

Urgent news, however you may define it, should be transmitted to you by telephone, FAX, or other media. When admissions requirements change, key personnel moves are announced, tragedy in some form strikes, or some similar dramatic news breaks, you should be contacted ASAP. Your credibility and composure are shot when your audience asks you about some late-breaking event back on campus that you don't know about.

And finally...

"College knowledge" is important! At first, accumulating and utilizing it effectively may seem daunting, but early effort on your part and gradual osmosis and immersion in your campus culture will eventually make you the expert you need to be. Yet, like driving toward the horizon (which you may do all too frequently), it is a goal forever before you. The knowledge is only the raw material, to be molded and sculpted by you, the artist. What you do with it is nearly as important as having it. And this is the focus of the next chapter.

Chapter 3

Background Information You Need to Know

The previous chapter dealt with information you need to know because you will be using it directly in conversations, presentations, and publications related to recruiting prospective students. This chapter deals with a different type of information we think will be useful to you: It concerns the "how's" rather than the "what's" of admissions. We start by providing you with a perspective on how recruitment activities fit into the larger concepts of marketing and enrollment management; we then focus on your values as they relate to professional ethics. While the methods and strategies of recruitment have changed a lot in the last two decades and will continue to evolve, especially through new technology, the ways that you as an individual function will have a significant impact on your personal credibility and that of our profession.

Marketing

Not too awfully long ago, "marketing" was a word you never heard in college admissions work—it just wasn't an acceptable term. Now, marketing has become the overall term that describes what most of us are about. Taken from business, marketing is often defined as a process involving the four P's—**product, place, price,** and **promotion**—which can be applied to any goods or services that one party seeks to sell to another.

Some might prefer to think that higher education sells itself, that its value is self-evident, and that it has a natural attraction that will bring in those students. Unfortunately, it doesn't work that way. The institution that hopes to secure the enrollment of those students who will clearly benefit from its offerings from initial matriculation through graduation and on to career and lifestyle must have a coordinated plan of resources, activities, and people.

As an entry-level staff member in admissions, you will not be expected to have an extensive knowledge of marketing. However, if you hope to succeed in your

job and advance in your field, you will need to understand the concept of marketing and apply the principles.

Product. While higher education is not a product in the sense of a car, a tool, or a VCR, it is a complex and costly experience in terms of money, time, and commitment, and it is one that can—and should—provide preparation for career and for life. You are offering a life-impacting and life-changing set of events, activities, and influences, but with no money-back guarantee. Your product is the sum of all the information discussed in Chapter 2, and you are the expert on it. The greater your knowledge and your skill in presenting the values of the experience your institution offers, the more students and parents will be inclined to invest their funds and their lives in it.

Place. "Place" in the marketing context refers to two aspects of your product:

- the values and benefits of your institution as compared to others and
- where the student is in relation to your institution.

Any element of your market position may incline a student for or against attending your institution. For example, proximity may be a primary attraction for a local student who needs to live at home and continue working, but it may be a major *dis*incentive to another local student who wants to try a new environment.

You cannot change the location of your institution, but you can change the way a student sees it. You may want to help the local student with a yen for a change to see that he or she could live on campus and experience a new environment through involvement with foreign students, the cooperative education program, international study program, and so on. This would minimize costs of travel, out-of-state tuition, and fears of the unknown, but would also provide change and a wider perspective. By focusing on the benefits of the location of your institution, you can help the student develop new ways of responding to your school.

You also need to understand the student's position. You can do this by using a variety of information sources to discover what students want in a college and then presenting those aspects of your institution that respond to student preferences and differentiating them from the competition. Data from the admissions testing corporations (College Board, ACT) can identify students by characteristics that correspond to your institution's strengths, such as those who have a GPA over 3.0, are interested in your majors, and want to attend a college about the size of yours close to home. Your job then is to let these students know that you have what they want and show them how you offer more of it than competing colleges.

Price. Whether you represent a very low-cost community college or a high-cost private institution, price will play a major role in your recruitment strategy. You need to know both the costs of attending your institution (made up of tuition, room and board, books and supplies, transportation, and personal expenses), as well as the availability of financial aid (see Chapter 2). Now more than ever, admissions recruiters need to be financial consultants as they counsel students and parents on creative ways to finance a college education.

Promotion. Promotion uses all of the strategies involved in getting people to understand and commit to your institution rather than to others. A major strategy in narrowing your field is segmentation—targeting those students whose needs and interests most closely correspond to yours and getting the best message to them at the right time. Here, you want to minimize the time, money, and effort

you spend on nonproductive prospects and maximize that spent on those who are likely to enroll.

Once you know the types of students you want and who might want you, you can use the "admissions funnel" (see next page) to reduce the number of high schools visited, letters mailed, invitations to special events, and follow-up contacts. You start with all high school seniors, narrow to those eligible (by location, minimum test score, academic interests, scholastic record, and so on), and promote your college or university (through letters from faculty, phone contacts from alumni, yield events on- or off-campus, and so on) to obtain applicants, admitted applicants, deposits, and enrollees.

A good enrollment plan does not stop here, but evaluates the results to help ensure that enrollees are retained through graduation and become giving and supportive alumni.

Market segmentation

To market effectively, your entire potential pool of prospective students is divided into subsets of distinct groups of people whose needs are similar and may be reached by separate marketing approaches. The three general market types include:

- *primary markets*: high-yield, consistent, identifiable needs easily met by product, accessible, close (e.g., church-related, geographical, socioeconomic, urban-rural);
- *secondary markets*: lower-yield, more distant, needs less closely related to product (e.g., further away, historically less productive); and
- *tertiary (test) markets*: experimental, suggest potential, require limited commitment.

The admissions funnel

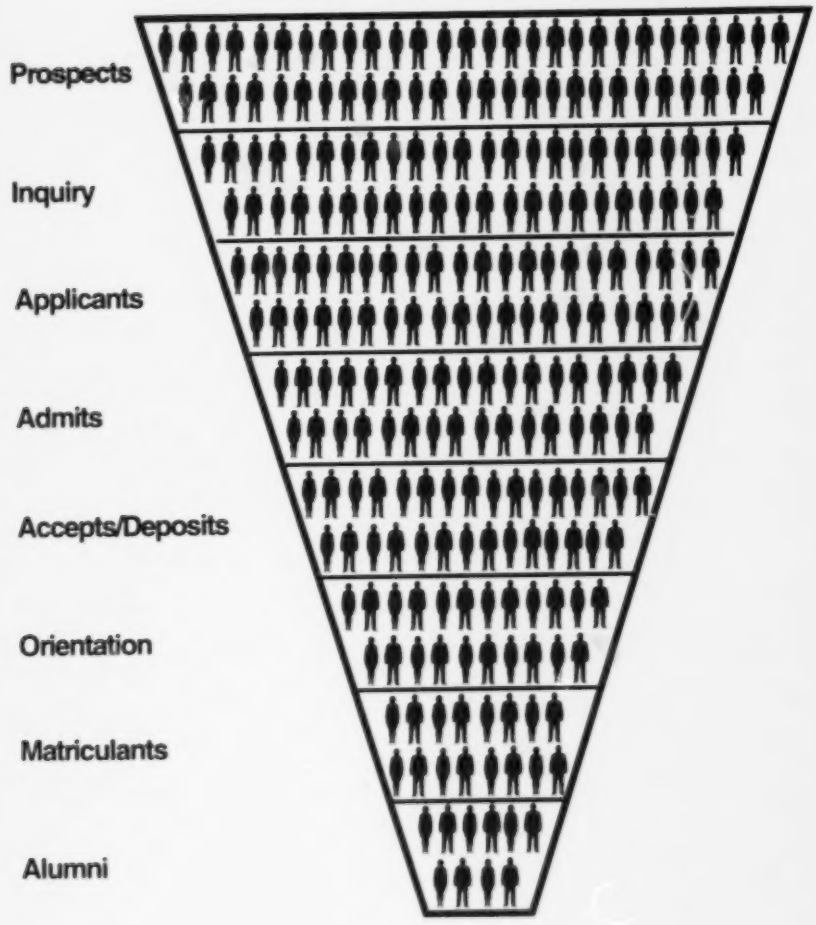
Another way of showing the process of narrowing your pool from a huge number of potential students to a small number of enrolled students (and eventually graduates) at your school is the "admissions funnel" (see next page).

Enrollment management

Many colleges and universities have adopted enrollment management as both a concept and a strategy to deal with the following:

- declining or changing demographics;
- limited or reduced resources;
- undesirable mixes of students;
- high attrition rates;
- unpredictable enrollment surprises;
- environmental disturbances (events that impact negatively on recruitment success, but occur beyond institutional control, such as a murder or fire on

THE ADMISSIONS FUNNEL



campus, a severe town-gown schism, a loss of major funding);

- demands by internal and external groups; and
- lack of organization, planning, research, and accountability.

What is enrollment management? In his book *Enrollment Management: An Integrated Approach*, nationally recognized authority Donald Hossler defines enrollment management as follows:

> a process or activity that influences the size, shape, and characteristics of a student body by directing institutional efforts in marketing, recruitment, and admissions as well as pricing and financial aid. In addition, the process exerts a significant influence on academic and career advising, the institutional research agenda, orientation, retention studies, and student services.[1]

Enrollment management seeks to define the specific enrollment outcomes the institution desires (e.g., by gender, ethnicity, scholarship, retention, origin, major, age, class level, interests, special talents, religious affiliation, and so on) and then develops the strategies (funding, staff, programs, research, facilities) to achieve them.

In theory, anything that affects enrollment is included in the concept, and certainly the success or failure of retention efforts has a major influence on enrollment. For our purposes, the "front-load elements," such as marketing, recruitment, admission, orientation, costs and financial aid, housing, academic advisement, and registration—all of which precede the beginning of classes for the new student—are those that are most closely related to the work of the new admissions professional.

The targeted recruitment of the special populations mentioned above (ethnicity, origin, etc.) is an example of market segmentation. For example, based on enrollment data, your enrollment planners may decide that a goal for the next three to five years will be to increase the enrollment and retention of Hispanic students. For the admissions office, this may mean strategies such as:

- more visits to predominately Hispanic high schools;
- utilizing Hispanic staff or students to meet prospects;
- developing bilingual brochures or videos;
- contacting students in the early high school or middle school years to ensure that they are on a college prep track;
- offering evening programs to assist parents in completing financial aid forms;
- soliciting support from high school counselors and community or church leaders;
- sending special direct mail pieces to selected ACT and SAT test takers (Hispanic; minimum class rank, GPA, or test scores; defined geographic area); and
- inviting admitted applicants and parents to special on-campus yield events.

As a concept, enrollment management views each function of each enrollment-related office as part of a larger plan, the center of which is the prospect/student. Each office must fulfill its role and coordinate closely with other areas so that the student perceives a seamless process dedicated to meeting his or her interests and needs in a timely manner, leading to enrollment, matriculation, and graduation. Goals and strategies are based heavily on research, data, and facts.

Campus direction for enrollment management may come from one person designated with that responsibility, from a manager heading various enrollment departments, or from a committee representing the major enrollment units. If you desire to advance in the profession, you may wish to consult your office's publication resources, campus library, bookstore, or higher education catalogs and explore the large number of books and articles on enrollment management. It is also a topic of frequent presentations at state/province, regional, and national association conferences. Informally, you may want to ask colleagues from other colleges about their applications of it.

Ethics

One element should pervade all of the foregoing—and that's ethics. In a time when pressures abound to increase applications and confirm enrollments, temptations are greater to engage in behavior that is unprofessional, dishonest, and in the long run detrimental to the individual and the institution represented.

In the appendix of this book, we have included the current statements on ethics from the major professional associations with which admissions personnel are affiliated. These will provide you with some of the do's and don'ts of this profession. While some behaviors or activities are clearly unacceptable, you may encounter many practices that fall in the gray areas. You will need to evaluate these practices according to your own values and those of your superior and your colleagues. A continuing attitude of questioning and challenging needs to permeate your approach to all aspects of admissions.

The following rules (reprinted with changes from an article entitled, "Put Your Ethics to the Test," in CURRENTS, June 1989) may help you when you are making those tough decisions personally:

1. *The "6 o'clock news" rule.* I will do this knowing that I can go live on the 6 o'clock news and defend it.

2. *The "no one will know" rule.* If I do this because no one will know about it (i.e., I can get away with it), I'm probably making the wrong decision—and I'm definitely making it for the wrong reason.

3. *The "abdominal dissonance" rule.* If my stomach doesn't feel right about doing this, I'd better not do it. (Also known as the "ulcer" rule, the "insomnia" rule, and the "foreshortened life" rule.)

4. *The "only-this-once" rule.* If I plan to do something "only this once," I'd better not.

5. *The "alter ego" rule.* When in doubt, I need to discuss this dilemma with someone whose doubts, questions, standards, and perspective will help me to clarify my own.

6. *The "Nazi" rule.* If orders from my superior contradict my legal, professional, or personal ethical standards, I'd better not follow them.

7. *The "politician" rule.* I must deal straight with people, even if I can't promise them all they'd like to hear—especially if they "trust me."

8. *The "long run" rule.* I will better serve myself and my institution over time by making the most ethical choice, not by using unethical means to obtain short-run gains and enduring the resulting loss of trust from others.

9. *The "self-esteem" rule.* I will be most productive and successful personally

and professionally if I trust and believe in myself. Unethical action erodes this self-confidence.

10. *The "golden rule."* I should do unto others as I would have them do unto me.

Note

[1] Donald Hossler, *Enrollment Management: An Integrated Approach* (New York: College Entrance Examination Board, 1984), 6.

Chapter 4

You, the Staff Member, and Your Assignments

As a new professional starting in admissions, you are aware of some of the basic functions that you will be expected to perform, such as visiting schools or giving admissions interviews. However, your role will most likely include a variety of other assignments that will give your job greater variety, challenge, visibility, and opportunity to develop your repertoire of skills and knowledge. In addition to your generic recruitment functions, you serve as part of a team, so you will have some responsibilities related to your team members. Your supervisor may also determine that you can make special contributions through membership on committees or coordination of special events. Regardless of your activities, effective use of your time will be more important than it ever was in college or even in your previous work experiences.

Whatever your initial job description, the quantity and quality of your staff assignments will vary depending on your skills and experience and the needs of the office and its management. These assignments offer you a wonderful chance to learn and grow as well as to demonstrate that you are capable of higher levels of responsibility leading to career advancement.

Roadrunner

Your first day on the job as a new recruiter may not be spent in the office at all, but on a school visit with or without a colleague to show you the ropes. On-the-job training (OJT) all too often translates into "Sink or swim."

If not the first day, then very soon after you will begin your role as roadrunner, a colloquial term for taking your admissions show on the road to high schools, community colleges, alumni gatherings, college days and nights, counselor conferences, and so on. While on some days, you may be tempted to think of yourself as just above a "snake oil salesman," most of the time you will recognize that you have answered a very high calling: After all, it's not snake oil that you're

trying to sell but higher education and your institution, both of which you need to believe in very strongly. And you are not trying to sell them to everyone, but to those prospective students whose interests and abilities will make them happy and successful at your institution; you are trying to make a successful match between the client or customer and your institution.

Unlike those who sell other goods or services, your product is intangible, expensive (both in dollars and in effort), and nonguaranteed. On the up side, most people (although certainly not all) already believe in the value of higher education, so for them it is a matter of finding the right place and the right price. Your job is to help them with both.

On the down side, you can offer only the promise, the opportunity, the vehicle for the values they seek—there are no certainties that they will find what they are looking for, whatever it might be. Different people will expect different things from their college experience—preparation for a career, personal growth, knowledge, development of moral or religious values, a ticket to graduate school, an athletic program leading to the pros, a four-year party, romance and/or marriage, a reprieve from work, and so on.

More than just promoting your own institution, you are helping people determine what they want and where they can best find it. Many, many young people have a limited understanding of who they are and where their strengths and weaknesses lie, much less the options available to them in terms of majors and career choices. Some students are perfectly qualified for your institution in terms of academic preparation, test scores, motivation, and finances, but may be interested in something—a major, sport, location, financial aid, religious orientation—that your institution doesn't offer. The better the "fit" between student preparation and interest and your institutional strengths and profile, the better the chances that that student will enroll and remain at your institution through graduation.

To become a good roadrunner, you will need several areas of skill and knowledge (Chapter 2). While much of this will come from OJT during your first travel season, you can avoid a good deal of grief by studying the information in Chapters 5, "Travel Savvy," and 6, "The School Visit and Follow Up."

Teamwork

Just as the whole is more than the sum of its parts, a team is more than its members. It can develop great energy and creativity from the synergy produced by its component parts. An effective and productive team is seldom composed of members who look, act, and think alike. Rather, their very differences cause a certain discomfort, instability, and dissatisfaction that keep the various team members alert, flexible, and moving forward. Like many families, a good team may argue among itself, but it joins ranks in a common front to the outside world. Ideally, members have shared values that form the nucleus for eventual agreement on procedures and methods.

Early on, you need to assess the strengths and liabilities that you and the other players bring to the team that is your admissions office. In the best teams, one member's strength offsets and compensates for another member's weakness. Each team member has a role to play, and most likely you were hired to play the role

defined in your position description and the interview and hiring process. While your role will change over time, your understanding and fulfilling of that role from the start will be a key to your success and that of your team.

What are some key qualities that you will need to make your team successful? Certainly communication tops any list. It is part of your job not only to inform your colleagues as needed, but to express your opinions, make recommendations, and provide your best input to issues and decisions affecting the well-being of your office. Honesty should be tempered by tact, especially when you are new. The more you get to know and trust your colleagues, the more you can "be you" and present your ideas openly and persuasively.

Committees

Sooner or later, you will be given a committee assignment—or two or three. While no sane person seeks these out, you can view them as an opportunity to learn, grow, contribute, network, and achieve recognition, particularly when the committees include people or issues outside of the admissions office. As an admissions recruiter, you face a special problem unique to your situation—you will frequently be off-campus and unable to attend meetings. Before accepting a committee appointment, be sure that you can attend most meetings or that other members know when and why you will be absent.

Some of the kinds of committees you may be asked to serve on may include:

- **Standing committees:** ongoing, year-in, year-out groups that deal with continuing issues, such as admission-financial aid coordination, parking, or staff development;
- **Ad hoc committees:** appointed, often with an expiration date, to look into one specific issue and make recommendations on it, such as guaranteed admission contracts with community colleges or pass fail grading;
- **Review committees:** charged with examining individual cases and evaluating them against standard policies, such as appeals for in-state residency for tuition purposes (at state institutions), grievances, and so on; if you serve on your school's admissions committee, you should receive special training for this role in which you will advocate for and help to select students who meet the profile determined for your next entering class;
- **Functional committees:** responsible for carrying out specific program responsibilities, such as commencement, campus student union operations, new student orientation, or disaster preparedness; and
- **Advisory committees:** provide input on various issues to individuals such as a director, dean, or vice president. (Note: Nearly all committees are advisory in that their actions can be appealed or, even, overruled, ignored, or changed by some authority, such as the president.)

Your role on the committee will depend on the nature of its charge. On one, you may discuss and advise; on another, you may vote to effect specific actions; on another you may be expected to carry out defined programmatic actions. When you are chosen to serve on a committee, you will want to sit down with the person who has appointed you and establish a mutual understanding of your role, including the time commitment and the degree of communication to your superior, peer colleagues, or others.

A meeting with the committee chair will help you understand his or her view of its functions, procedures, and issues. A quick scan of past minutes will give you a flavor of the kinds of items discussed or acted on, the members who are leaders (some self-appointed), the way the group operates, and so on. Even though the minutes are the official record of what happened in the meeting, much that is of importance may not be in the minutes.

As a novice in admissions at your college or university, work on committees that will allow you to explore new subjects; learn how your campus functions; meet a variety of faculty, staff, students, and alumni; and have an impact on your institution. Good work on a committee can bring recognition that makes you, your boss, and your office look good.

Some goals you may want to set for yourself as a committee member might include:

- understanding fully the level of your commitment before you accept the appointment (how much time, effort, and resources it will take);
- clarifying your role (are you representing your office? providing expertise? fulfilling some functional responsibility?);
- working to understand each committee's unique "culture," process, members' roles, expectations, etc.;
- doing your homework (reviewing minutes and reports, seeking input from others, preparing for items assigned to you);
- communicating issues of importance, problems, concerns, and progress as needed to your boss and colleagues; and
- volunteering for committee work that needs to be done and taking a leadership role (this is a great way to earn respect as you learn).

Meetings

Committees meet. Office staffs meet. Team members meet. It's inevitable that you will spend some of your on-campus time in meetings. What can you do to make them as productive as possible for yourself and others?

- Show up—on time.
- Be prepared—review minutes and study agenda issues.
- Listen carefully and evaluate what is said.
- Take notes on important items, what you need to do in response to them, and who needs to be informed.
- Express yourself clearly, concisely, and with appropriate supporting information.
- Articulate accurately the position of those you represent (your boss, colleagues, applicants, department).
- Observe unspoken behavior and communication of committee members (body language, who sits next to whom, who dominates or defers, emotional displays), which may have more meaning than the spoken words.
- Meet and get to know people before or after the meeting and during breaks so that you can develop new acquaintances and relationships.
- View every meeting as an opportunity and challenge to learn—about others, about your institution, about yourself.

Delegation

As you review your job description, you will see that some items require you to perform identified functions for the office (such as school visits), as well as other functions (performed by you alone or with others) for your superior, associate director, or director. Your job description will probably not list all of these; some will be added as you are delegated new tasks, duties, and responsibilities. These assignments may be short, one-time, and quickly handled (such as overseeing the delivery and storage of new applications) or long, intermittent, and continuous (serving as coordinator/adviser of the student admissions volunteer group, for example).

When you are delegated a new task, you will want to do the following:

- Clarify the assignment: What outcome needs to be produced?
- Understand the timeframe: Must it be done ASAP, within the month, or continuously until you are told otherwise?
- Know your level of authority: Can you determine approach and follow-through without further approval, or must you consult at every step?
- Ascertain how much control you have of the resources necessary to your task—budget, staff, space, and computer.
- Determine how to communicate progress or final results: Will these be discussed informally, presented in a memo with documentation, in-progress and final reports, with a tour, through a formal evaluation?
- Present concerns if your new task conflicts with other priorities—reduction of time available for other projects, degree of impact on fiscal or computer resources, and so on.
- Notify others who will be affected by your new assignment.

Enthusiastically accepting or even volunteering for jobs over and above your basic position responsibilities demonstrates energy; willingness to support your office, division, or institution; interest in learning new skills and knowledge; and overall commitment. All of these help to form a positive image about you in the mind of your superior and put you in good standing when raises, promotions, recommendations, or other job opportunities occur. But they may also bring you more work than you can handle (good work brings more work), so temper your enthusiasm with reality. Which brings us to ...

Time management

With more and more pressure on us to perform better, faster, and longer, we need to be constantly seeking ways to make ourselves more effective in what we do. Like money, the time available to meet growing demands is finite. Whether job time or personal time, we no longer have the luxury of squandering it.

There are many excellent books on this important topic. Tops on our list are Alec MacKenzie's *The Time Trap;* Alan Lakein's *How to Get Control of Your Time and Life;* Stephanie Winston's *The Organized Executive;* and Michael LeBoeuf's *Working Smart: How to Accomplish More in Half the Time.* These highly recommended references are worth your time to read and apply to your own situation. Videotapes and audiotapes on time management may be available in your office or division resource center, and seminars on the topic are offered widely.

The keys to nearly all advice on time management are *values* and *prioritization of activities*. Deciding what is important and assigning time to functions that will produce outcomes directly related to what is important are the bottom line. Neither is easily done.

Your first step is to review carefully all the information you have that defines the mission, goals, and strategies for your office. Ideally you will have a campus enrollment plan that contains the mission, goals, and strategies for your office and defines campuswide outcomes and your office's or department's role in effecting them. If you don't have an enrollment plan, your primary document would be a copy of your office's mission and goals statement.

Once you have reviewed this information, meet with your supervisor to outline your own contributions and goals for the year. These may be broad and general, such as knowing all of the institutional information necessary to recruit students, or narrow and specific, such as visiting 50 high schools and generating 50 applicants and 15 admitted applicants by December 31.

Your list of "what's important" should range from three to seven items. These items give you targets at which to aim strategies. You are asking yourself, "What can I do *in the time that I have* that will make the biggest impact on 'what's important' for us to accomplish?"

Work with your boss and your peer colleagues to help identify the most effective "how's," and stay alert to the ways your competitors do their jobs. New technologies, for example, have vastly changed the admissions profession in the last decade, enabling everyone to work smarter and better.

The suggestions below will help you manage both your off-campus and on-campus time:

Off-campus time:

- Plan, plan, plan your travel itinerary, what to take, when to make visits, whom to see (see Chapter 5, "Travel Savvy").
- Keep track of information to make the best use of your time during school visits (data on schools, prospect list, completed contact cards, and so on).
- Use "down time," such as mid-afternoons during travel, for paperwork, exercise, sleep, calls back to campus.
- Be flexible about rearranging your schedule when plans do not work out. For example, if no students show up during a school visit, meet with the counselor, update your school's file, or ask permission to hang out in the cafeteria and chat with students.

On-campus time:

- Sort mail (or have a secretary do it for you) into folders labeled "important," "action," "read," and "junk"; then focus your energy on the first two, handling each piece of paper once or as few times as possible.
- Try to coordinate your day with your biorhythms. Do tasks requiring high energy, concentration, or creativity when you are most alert. Clump together activities of a similar nature (interviewing applicants, returning phone calls, or e-mail).

- Within your office resources, delegate routine work to your clerical or student staff.
- Set personal deadlines for responses on items for which you are responsible, and build in "tickler" reminders to keep on schedule.
- Learn enough technology to function effectively (accessing student data on admission or financial aid status on-line from your desk terminal, for example), and seek new ways to apply your expertise.
- Although this is often hard to do, try to reserve blocks of time on your calendar for items requiring concentration—meeting deadlines when you are writing materials for outreach publications, for example.
- Contrary to our suggestion that you be enthusiastic about accepting tasks beyond your own responsibilities, sometimes you may need to consider declining (very tactfully) requests for your time that are not directly related to your goals. Not having to do something saves big time! It's important to recognize when you have reached the point where you cannot do all that is asked of you. At that time you will need to consult with your boss to determine what tasks are most important for you to do and what might be assigned to others or left undone.
- Break large projects into small, do-able parts.
- When you complete a difficult task or portion of an assignment, reward yourself with a small treat (a walk to the bookstore, a peanut-butter candy cup, a phone call to a friend).

Interviewing and counseling

Most new admissions recruiters do a lot of on-campus interviews with prospective students and or their parents. In these interviews, you may be primarily a giver of information (providing an overview of your campus and responding to questions), a taker of information (where your input becomes a significant element of the institution's decision to admit or deny the applicant), or both. Here are some suggestions for handling this important role:

- Say only what you know to be true and accurate.
- Promise only what you can deliver.
- Be scrupulously honest and genuinely caring.
- Listen carefully and show that you are listening—take notes, give affirmative responses (nodding your head, expressing agreement), and show interest and attentiveness (through posture and eye contact).
- Point out where the features of your campus equate to, complement, or diverge from the profile and interests of the prospect.
- *In fairness to the prospective student*, determine whether his or her qualifications and interests are truly a good match for your institution.
- Employ humor where possible to put the prospect at ease.
- Project confidence in yourself and pride in your institution.

During your initial training period, you should have access to manuals that contain all the information you need and perhaps even tell you how to conduct an interview. It would be even more useful to sit in with veteran staff to observe their pace, style, and methods. Perhaps you might ask them to sit in on your interviews and give you a friendly critique. No one approach will be right for every admissions person or every interviewee, but you should develop one that

is comfortable and effective for you.

As an admissions officer, you may be expected to report your reactions to the candidates you interview. You might even be asked to defend candidates at decision-making times. If this describes your role, you will want to know upfront what criteria to use, what information to elicit, and how best to advocate for or against a candidate. Your best sources for this information should be fellow admissions officers who share their written and unwritten guidelines.

Event planning

As part of your job, you may be asked to take charge of one or more major recruitment events on- or off-campus. These events could be small gatherings such as a yield event with alumni at a distant location, or they could be major "preview" days for area or state province high school juniors and seniors. While uncontrollable elements (weather, strikes, sickness, power outages) make planning any event "risky business," the operant word here is planning. Look first for files, checklists, guides, time charts—anything from a previous similar event that will give you a road map you can follow. This can save you a lot of work. If your event is a first-ever occurrence, leave a trail of documentation for the lucky person who gets to do the planning next time around. (You'll be especially glad you did this if *you're* that person.)

The steps outlined below can help you organize your events for success:

• Define a clear purpose or goal for the event. This goal will provide a ruler to measure and evaluate all parts of the event.

• Identify the key players for the event, and draw up a clear statement of their responsibilities. Include yourself and your immediate office staff as well as others who will be involved, such as the following:

- other recruitment-related office staff members;
- appropriate plant or building operations personnel (unlocking the door, ensuring that chairs and tables are set up the way you want them);
- publications experts (sending notifications, letters, posters, invitations, programs, hand-outs);
- audiovisual specialists (turning on and monitoring the sound system, showing films or videotaping proceedings);
- food service staff (helping you decide what food will be served, when, how much, and at what cost);
- special guests (your president, vice president, faculty presenters);
- entertainers (school choir, dance ensemble, cheerleaders) and their equipment;
- volunteers (students, faculty, alumni, parents);
- security parking officers (special permits, reserved spaces, traffic control);
- first-aid or medical care staff availability;
- experts on accommodating disabled persons (including those who can sign for the hearing-impaired).

- Know your funding status: Do you have a fixed limit, a break-even budget from ticket sales, contributed or in-kind services (vs. charge-backs)? Are you expected to make a profit? How will income and expenditures be documented and accounted for (purchases may be heavily controlled by your campus purchasing office)? If you work at a state institution, investigate the possibility of setting up a foundation or local account to avoid state requirements and constraints (having funds is useless if you can't spend them for what you need). Regardless, keep scrupulously accurate financial records and methods of handling and accounting for money. We probably don't have to explain why.
- Develop a written grid or spreadsheet timeline including activities, the person responsible for each one, location, deadline for completion of each element, and projected costs. Share this with all the players so that everyone understands everything upfront.
- Reserve facilities as far in advance as possible (and confirm them in writing) and any staff necessary to set up or take down furniture, sound systems, and so on. Check carefully for conflicting events—the day your lawns are fertilized, a statewide athletic tournament on your campus, city parade, conference at a competing school that would draw your intended audience, nationally televised Superbowl playoff game.
- Adopt a "visioning" process with others involved in planning. In this process, you are a participant at the event you are planning, and you mentally "walk through" every part of the event from first contact to return home. Develop worst-case scenarios and how to deal with them—have a "rain plan," an alternate site in the event of a bomb threat. Think first of your participants' safety, then their comfort, as well as the fulfillment of your purpose.
- Communicate constantly with everyone involved to share information, discover and address problems, and generate shared commitment and "buy-in."
- Review personally all written materials for accuracy, format, appearance, timeliness, and so on.
- Examine anything that does not feel right, raises a question, is incomplete, or you don't fully understand.
- Give your trust completely only to those of proven dependability and in small increments to those in the process of proving themselves; distrust those who refuse to share information with you, act with smugness or hostility, or assume uncompromising stances, and make extensive special efforts to ensure that they do their parts right (if they fail, you may fail).
- Be flexible at event time and ready to adjust to unexpected conditions.
- Evaluate the entire process carefully during and following the event.
- Express verbal and written (copies to superiors) appreciation to everyone who contributed to the success of the event. This is critical to your future success as you will inevitably deal with these people again.
- Leave complete files, budgets, checklists, timetable, orders, receipts, confirmations, and so on, for yourself or whoever puts on this event the next time around.

A helpful guide for more information on this topic is April Harris' book, *Special Events: Planning for Success* (published by CASE in 1988).

Conclusion

All staff assignments need to be placed in the perspective of priorities. Your primary functions always come first and should never suffer because of time and effort spent on assignments of lesser priority. While you may see some staff assignments as just more work, others will be pretty interesting and often fun. They may also represent your boss's recognition that you are capable of performing varied tasks well and that the skills and networks developed will prepare you for more advanced work and positions. You may even want to volunteer for some assignments, further showing your interest, enthusiasm, and initiative. The only final caution we would offer is to avoid taking on any more than you can do and do well. Your professional reputation will be enhanced by the quality of work done well rather than the quantity of work done poorly.

Chapter 5

Travel Savvy

First things first: If your travel experience is limited, you need to know how to get places and return with a minimum of hassle. Since travel may comprise a large part of your job early on, you may want to consider carefully the suggestions offered below.

Before planning your itinerary—much less taking off—do two things:

• Connect with the office secretary who is in charge of travel, and learn the policies and procedures followed by your office and campus. Have this invaluable person walk you through all the paperwork so you know what you have to spend, in what categories, what receipts or documentation are required, how to complete forms for reimbursement, use of campus credit cards (e.g., telephone, rental car), procuring advances, and so on.

• Read and follow to the letter your office or institutional guidelines on travel. A sure way to get yourself in trouble quickly is to transgress travel policies or procedures. Few areas are subjected to as much scrutiny, control, and criticism as the spending of travel funds. Learn what you can and can't do, where there are strict limitations, and where there is flexibility. When in doubt, ask, even if you have to call from an airport or gas station telephone.

Arrangements

An important key to successful travel is planning. While nearly every trip will vary somewhat from the most careful of plans, planning will give you the freedom to adjust within your overall schedule.

• *Plan your itinerary realistically: Keep yourself in mind!* Don't shortchange yourself by trying to visit too many schools. Make sure to leave enough time to get from the airport to the hotel and from school to school, especially if you are unfamiliar with the territory. Not only might you be late or miss commitments altogether, but you will place tremendous stress on yourself and perhaps be tempted to respond inappropriately—by speeding, parking illegally, skipping meals, and so on.

• *Make all arrangements (for motels or hotels, rental cars, schools to be visited) early and in writing.* Book your arrangements well in advance of the dates you

need them. Hotel rooms and school calendars can be impacted for any number of reasons, from centennials and homecoming to local holidays or special events. Be sure to request any special rates or accommodations, such as nonsmoking rooms or rooms and refreshments for meetings. Try to get discounted rates whenever possible—weekends, off-season, state-related business, senior citizen, whatever applies. Always ask that written back-up be mailed or FAXed to you, and carry this with you in case disagreements arise "at the counter."

• *Stay where other recruiters are staying.* Often, for college fair "tours" a particular motel or hotel may be identified by a sponsoring organization such as the National Association of College Admissions Counselors or a state/province association or by veteran roadrunners who have found it a comfortable, safe, and cost-effective place to stay. If this is the case, joining the crowd will simplify your search and offer added advantages, including a higher level of security (fellow recruiters look out for each other), mentoring opportunities (your colleagues can help you find schools and tell you where to park and whom to talk to), friendship, and help should problems arise. You may even find someone you would like to room or travel with, reducing expenses and making trips more pleasurable.

• *Make confirming phone calls a few days before you leave.* Reservations have a way of disappearing or changing or even being canceled, so a quick call by you or your secretary can frequently head off an unhappy situation. If you stay with one motel or hotel chain with an "800" number, you can confirm everything free with one call.

• *Get accurate directions and up-to-date maps.* Nothing is more frustrating than not knowing how to get where you want to go. If you're lucky, you can get directions and maps from the person who did the school visits before you came on board or from the office files. Very specific directions are immeasurably helpful, and this means not just where the school is located, but how to get to it from the previous school, the airport, the freeway, or the motel or hotel. You can always ask local people for help even if you have last year's directions; they may know better routes or alert you to new construction, train delays, or congestion due to local events.

There is no substitute for a good map. Airports, motels and hotels, and car rental agencies are good sources. Local bookstores will often have what you need: a recent map showing macro and micro layouts. You need to know major roads and freeways, but also detailed street maps (e.g., Thomas Guides) to figure out your routes. And you need to arrange materials in your front seat so that you can drive safely *and* navigate simultaneously: Use a highlighter to outline routes and have whatever you need to read materials—reading glasses, compass, pocket flashlight or interior lamps for night travel. But always remember that safety is more important than punctuality. Rather than risk an accident, pull over if you need to study your map or read directions.

• *Utilize travel agents to get the best rates and times.* Whether you make your own arrangements or delegate this responsibility, you may want to use a travel agent who can aggressively seek the best deals in overnight, rental car, or airplane reservations and the times and routes that best suit your needs. Costs can vary widely, so having an advocate who can go after the lowest rates or packages can save your office money and perhaps obtain upgraded facilities, cars, or flights. There is usually no charge for such services, and you can have tickets and itineraries delivered to your office. Your campus may actually have an appointed

agent for you to work through, perhaps even on-campus. And that agent may also be valuable when you want to make personal travel plans.

• *Obtain frequent flyer credit anywhere applicable.* Join the frequent flyer clubs of any airlines you anticipate using so that you can begin accumulating mileage leading to awards. While most institutions will allow you to enjoy these for personal use, check your campus's policy. You may be required to relinquish frequent flyer credit for official use. You may also join the preferred customer clubs at major hotel chains (Hilton, Marriott, Hyatt) if you stay at them frequently; privileges can include express check-in and check-out, upgraded rooms, frequent flyer credit, and so on. Be sure to have your frequent flyer account number entered to receive proper credit at the time of ticket purchase.

• *Pack lightly, but flexibly.* Sounds easy, doesn't it? Unfortunately, there are many variables that can increase the weight and volume of your luggage, including the length of time you are traveling, the kinds of duties you must dress for, the anticipated weather conditions, the coordination potential of your wardrobe, whether you are driving or flying, the time of year, and so on.

Consider developing your wardrobe around the following criteria: comfort; durability; resistance to wrinkling; lightness of weight (unless you're going someplace very cold); maximum coordination of color, texture, weight, level of dressiness, style, and appropriateness; ease and cost of washing and ironing or drycleaning; and image projected of you and your institution. Most larger clothing stores have salespeople or personal shoppers who can help you design an appropriate wardrobe for your age, position, working conditions, image, and pocketbook. Begin with basics that are of good quality and versatility, and build from there.

Sturdy and durable luggage is a must. Colors should minimize soiling; fabrics should stand up to rough treatment (Cordura nylon is particularly tough); sewing and reinforcements should be especially strong; storage should be practical (separate areas for wet items, soiled clothing, containers that could leak, hangers, shoes, umbrella, bulky items like a hair dryer); and carrying comfort (weight, bulk, wheels, hand and shoulder straps) should be high.

Purchasing several items from the same manufacturer (Lands End, for example) can be practical and color consistent: a large suitcase (hard- or soft-side) or garment bag (for shirts, blouses, suits), a medium-size carry-on piece that can fit under an airplane seat or in the overhead compartment, and an attache-size piece for materials (pens, name tag, paperwork, business cards, books, Walkman) needed for your "portable office."

Think seriously about buying a larger piece with *wheels* built in or attached and with a leash or handle to pull it through airports and into hotels. Your shoulders and back will thank you for it! A strong, but collapsible cart can be useful for transporting unwieldy luggage and for dollying brochures from the school parking lot into the gym. All pieces should have an identification tag with your name, title, and office or home address and phone number. Use the kind that has a flap to cover the information for privacy and security.

Other travel items merit consideration. Toiletry and make-up kits can accommodate your bathroom materials. These, too, should be durable, large enough for your take-alongs, and waterproof in case of leaks. Shoe bags can protect both shoes and clean surfaces from damage, and inserts, especially cedar ones, will help frequently worn shoes maintain their shape and condition. Tissue paper between clothes reduces wrinkles to a minimum.

Make sure you have fresh batteries in your travel alarm clock (a must, even with wake-up service) and your miniature flashlight (very handy at night in a dark and unfamiliar hotel room). Miscellaneous items can be useful when you need them, including a "classic" Swiss army knife, a sewing kit (pick one up from better hotel amenities), band-aids, topical pain or abrasion ointment, aspirin or your favorite headache/cold remedy, antacid, foam ear plugs, and any other small, "just-in-case" things that can make your life on the road easier.

After some experience with extended travel, you should be able to get your packing down to a science. What goes where, how items should be folded, and separating dirty clothes from clean will become second nature. If your job requires that you travel for long periods of time, you will want to consider clothes that you can launder and iron easily away from home. If you are in a week, out a week, you may want to build up a separate travel wardrobe and toiletries to simplify the process.

Materials

Your supervisor and colleagues will be able to tell you the standard recruitment materials to take on travel. A pre-prepared travel case and checklist of items supplied by your office are a great help. You can estimate how much of the material you will need from records of previous years' visits or from numbers based on a prospect school's senior class or college-bound seniors. You can send large boxes of these materials ahead, addressed to yourself at the hotel or motel and marked to be held for your arrival. Be sure to leave ample time for delivery. Ideally, your contact publications and cards should be the bulk of what you bring, with additional materials sent from your campus at a later date. You might have to have more supplies sent to you if you start running short.

If you drive your own car, estimate how much of these materials you have room for and how much wear and tear they will receive. If you recruit more regionally with fewer overnight trips, you may be able to take a greater variety and volume of materials. For example, some recruiters go to area college fairs with a supply of catalogs (heavy!) and information sheets for every major their institution offers. Some institutions use laptop computers to intake data on prospects and communicate via modem to the campus computer to upload information and run admission and financial aid status checks, request materials from different departments, admit students "on the spot," make preliminary financial aid commitments, and send out individually addressed follow-up letters.

Airlines

Flying, with its many pluses and minuses, may be part of your travel plans. Your office support staff or travel agent should be experienced in making arrangements, purchasing tickets at the most competitive rates, and so on. Here are some suggestions that may make flying easier:

- Arrange for advance seat assignments (window or aisle, front or back of the plane) and special food arrangements (diet, low sodium, kosher, or vegetarian).

- Always keep your ticket in the same safe place to avoid "Where is it?!" panic.
- Plan the use of wait and flight time (follow up, read, do routine paperwork, draft letters, nap).
- Take contingency materials on board, including personal overnight survival items and one day's visit materials in case of lost or delayed luggage.
- Allow ample time to arrive at the airport early, especially during holiday or heavy travel times when traffic, parking, rental return, ticket counters, security screening, and gates can be severely congested.
- Check luggage through to your final destination when necessary or convenient, but be aware of the risk of its not arriving with you.
- Wear comfortable clothing if possible, recognizing weather conditions at both ends of the flight and that planes can often be cooler than your comfort level. Layering your clothes is a good idea; you can add on or take off as needed.
- Ask for what you want in flight, including magazines, pillows, blankets, beverages, and information.
- Don't eat or drink too much before or during the flight. This tends to have a greater effect because of inactivity and altitude.
- During busy times of the day, week, or year, allow extra time for luggage retrieval, rental car pickup, and driving to your destination.

Rental cars

If you fly to a beginning point of your visit schedule, chances are you will need to rent a car. Again, your office staff should comparison shop (using 800 numbers) for the best rates for the time, location, and size of car you need. You may be able to get special rates if you use one vendor exclusively. In addition, you will want to:

- Verify that contract charges and conditions confirm the arrangements you made ahead of time.
- Follow your college's policy on insurance coverage. If you are covered by your institution or your credit card company, you can forgo the rental agency's supplemental—and expensive—insurance options. Be sure to check this carefully ahead of time so that you are not personally liable in case of accident, theft, etc.
- Make sure the car you get is equipped according to your needs (automatic transmission, air conditioning, large trunk capacity).
- Find out whether you should return the car with a full tank of gas or empty (rental car companies charge higher rates per gallon to refill your tank than gas stations).
- Get a map or written directions that show where you should return the rental car. Drop-off locations are not always in the airport and may not be the same as where you picked up the car.
- Before you get in the car, check the exterior and interior for any existing damage. If you find any, make sure it is noted on the contract before you leave the agency. Otherwise, you may be held responsible. For your own safety, note the general condition of the tires. If they are balding, bulging, or low, ask for another car!
- Familiarize yourself with interior controls; position your seat and all three mirrors *before* you start out—*not* in the fast lane on the freeway!

- Know how to access the hood latch, fuel door, spare tire, and so on, and ask about any features that may be different. (In most newer cars you need to press a hidden button to release the key from the ignition or put your foot firmly on the brake before you can move the gearshift out of "Park.")
- Have written information on where to call and what to do in case of an emergency or accident.
- Request another vehicle if you have any doubts about the roadworthiness or functionality of the one you are assigned.
- Ask if there is an "express check-in" when you return the car. If the drop-off location is not in the airport, find out how often the shuttle bus goes to the airport terminal.
- Negotiate for upgrades at no extra charge if opportunities arise.
- Request frequent flyer credit from participating agencies.
- Drive extra carefully until you are confident about handling the vehicle, particularly if it is different from your own—larger or smaller, higher or lower powered, less visibility, or different type (van, wagon, four-wheel drive).
- Buckle up your lapbelt. This is easy to forget, but it's the law in many states.

Driving your own car

If you are expected to drive your own car on these trips (this should have been agreed upon before you accepted the job), you gain control over your transportation. However, you need to be constantly looking for ways to minimize expenses and maximize your safety. Logging high mileage produces extra mechanical wear and tear on your car and higher maintenance costs, not to mention lower trade-in value. If you are reimbursed for mileage, consider placing those checks in a separate account devoted to vehicle upkeep, so you are not tempted to spend them on other things while your car's condition deteriorates. Constant loading and unloading of your recruitment materials can also wreak havoc on the interior and trunk of your car.

If you are considering replacing your current car, which may be too old or too small, you might look into leasing options, which could reduce your initial cash outlay.

If you are driving your own car, you will want to:

- Make sure your car is in top mechanical condition; find a good mechanic, dealer, or repair shop and follow regular maintenance schedules (in your owner's manual), especially oil and filter changes.
- Have proof of your ownership and up-to-date insurance coverage in the vehicle at all times (this is required in some states).
- Get advice on the best routes, times of day, road and weather conditions (ask the locals, tune in to radio stations).
- Use good maps and directions.
- Take breaks at least every two hours.
- Keep careful track of mileage (use "tripometer") driven for business purposes for reimbursement or tax deduction.
- Take extra precautions for your car: Park it in well-lighted areas at night, consider purchase of a lockable car cover, and explore security devices (e.g., steering wheel "club," alarm system).

Hotels and motels

Much recruitment travel involves staying at hotels and motels. Their quality and price can vary tremendously, so ask colleagues, alumni, or local residents for recommendations. Develop your own list over time, and, as noted above, stay at the same place as your fellow roadrunners when possible.

The following suggestions can help you make your time away from home safer and more comfortable:

- When you check in at the registration desk, have with you written confirmation of your arrangements.
- Get in the line served by the friendliest (but most efficient-looking) registration clerk, especially if you see his or her name on an "Employee of the Month" plaque.
- Make sure rates and accommodations are the same as specified in your written arrangements.
- In high-rise buildings, request a room between floors two and seven for security and fire safety.
- Ask for personal preferences as appropriate (nonsmoking, away from elevator, window view, king-size bed).
- Inquire about the availability of any special services or amenities you need (laundry, drycleaning, use of iron and ironing board, fitness center, coffee shop, FAX machine).
- Request another room if the one assigned is not acceptable (near a noisy group or elevator, too hot, too cold, and so on).
- Don't let anyone else know your room number unless you personally choose to give it out.
- Use bellhop assistance on those occasions you may really need it (to transport heavy and awkward materials, if you have back or other physical problems).
- Learn fire escape routes (shown on the back of your room door) soon after checking into your room.
- Lock and double-lock doors (including connecting doors) and windows whenever you enter your room, and check to see that the door is locked behind you whenever you leave.
- Don't leave money, credit cards, jewelry, or other valuables in your room, even if you're just going out for a fitness workout, jog, or a cup of coffee.
- Lay out a set of clothing (including shoes) next to the bed in case you have to make a quick exit in an emergency (fire, earthquake, etc.).
- Use room service when you are really tired, have safety concerns about leaving the hotel at night, or just want to be alone and relax.
- Set your own alarm clock and request a wake-up call.
- Keep all receipts during your stay, and make sure you have them when you check out. One way to do this is to pick up a hotel envelope each morning or on the first day and put all trip receipts in it.

Return to campus

While trying to get away from campus can be traumatic, coming back can be

an equally tough transition. Wherever we are—on campus, traveling, on vacation—we get into rhythms and patterns, so that any change requires adjustment and reorientation. On the road, you are basically in charge of your time, pace, and activity; on campus, you often lose that autonomy to your boss, secretary, colleagues, and the unexpected, not to mention your home environment of spouse or roommate, parents, children, and pets. Your eating, sleeping, and activity patterns will vary depending on whether you are in your "home" or "away" mode. To help ensure a successful homecoming, you may want to:

- Recognize that adjusting from travel to campus can be as demanding as adjusting from campus to travel.
- Give yourself breathing time before returning to the office. Hitting the office at 3:30 p.m. on Friday after a week's travel is probably counterproductive. It may be nice to see your colleagues again and catch up on the news, but you won't get much done, and neither will they.
- Expect that your desk will be piled high and people will be waiting to pounce on you, but ...
- Begin with travel follow-up work while your memory is still fresh; your replies will be received quickly, and you can get it behind you.
- Deal with people, phone calls, and mail—in that order.
- Prioritize communications to the degree possible: Have the clerical staff sort your mail into folders labeled "important," "action," "read," and "junk"; have them note the purpose of callers to prioritize your order of response; respond to electronic-mail and voice-mail at one sitting; handle each item once if possible, followed by action, referral, filing, holding for action, or discarding.
- Understand that nontraveling staff, who may not appreciate your fatigue, problems, failures, or successes, will expect you to respond to their pent-up needs or frustrations and may even be secretly jealous of your "adventurous and glamorous" lifestyle.
- Exchange "war stories" with returning fellow travelers to gain insight, share experiences, and get perspective; it is good to laugh at yourself and with others about all of the crazy things that happened to you; this is part of the fun of your job, and it's a great way to relieve stress.
- Reestablish priorities among your family and friends, activities and hobbies, networks and community, duties and responsibilities, chores and errands, physical and spiritual well-being, and sense of stability, values, and direction. Balance is crucial.

Some last words on travel

Here are a few final overall travel savvy items to keep in mind:

- Consider your personal safety and security first.
- Be assertive about what you need and want.
- Don't easily accept less than what you think you deserve (practice saying, slowly and deliberately, "No, that's *not* OK").
- Reset your watch when you change time zones.
- Expect the unexpected and try to be flexible.
- Enjoy the local attractions, food, and folks when free time allows; it's great to build in a few hours or even a whole day for yourself.

- Connect with a recruitment friend for advice, companionship, and support on extended trips.
- Utilize your time efficiently, but recognize the hours you are putting in and the stress you are under, and give yourself quality time for sight-seeing, relaxation, rest, reading, and especially calls home.
- Eat reasonably but well, and maintain exercise routines.
- Try to keep a sense of humor and perspective.

Chapter 6

The School Visit and Follow-up

The primary focus of most recruitment travel is the school visit. Whether in the form of a college day or night, individual sessions with interested students, addressing a class, or involving different levels of students (freshmen through seniors or two-year college transfers), this approach to personally assessing prospective students has remained a mainstay of the campus's overall marketing strategy. Many enrollment managers question its cost-effectiveness, yet few if any deny its importance in reaching potential applicants, their parents, and their counselors in an increasingly competitive environment.

The following comments will introduce you to the school visit. First we cover "the basics," which apply to most visits you will make; then we address what you as a rookie need to know; and finally we suggest some approaches you will want to use as you mature into a veteran recruiter.

The school visit: The basics

- Make your personal travel arrangements—airline, hotel, rental car—well in advance for savings and convenience (see Chapter 5). Then confirm them just before you leave, including a phone check to make sure that materials you mailed to yourself have arrived.
- Reserve in advance any admissions office or institutional equipment (VCR, travel case, motor pool car, table drape) to avoid conflicts when the time for your visit arrives.
- Have each visit arranged with the host school well in advance, with a confirming reminder (call or note by you) of date, time, room location, and special needs (e.g., audiovisual equipment).
- Send pre-prepared fliers or posters in advance so that the school can advertise your visit.
- Schedule your time carefully for the day *before* you leave campus (to give you flexibility and reduce stress) and the day you *expect to return* (to allow time for follow-up and adjustment). See, also, "Return to Campus" in Chapter 5.
- Use the Travel Checklist (below) before you leave the office.
- Bring and use directions (your own or those from school staff) or the previous

recruiter) on how to find the school, where to park, and where to go once you arrive.

- Try to arrive early, allowing for delays, so that you can be punctual, prepared, and calm.
- Review notes from any previous visits (perhaps your own); gather materials for the number of students anticipated; note how many from that school applied or enrolled in previous years (including names, if possible); bring lists of students from search services, alumni referrals, previous requests for information, etc.; know contacts' names (counselors, parent aides, advisers, secretaries, career center specialists) and any personal information about them that might be good conversation starters (children, interests, accomplishments, past referrals).
- Greet your contact people warmly, but sincerely. Offer appropriate materials (counselor kit, supply of brochures, applications, catalogs), and present your business card.
- Schedule time, if possible, to make a presentation about your college to the college-bound and/or head counselor, setting specific goals related to his or her awareness of your institution or relationship to you (cover special new programs, learn about the needs of the counselor, establish a personal connection).
- Adjust your presentation to the size of the group (one-on-one, small or large group), environment (classroom, gymnasium, cafeteria, auditorium), and composition (age range, ethnicity, culture, interests, preparation level). This step is truly vital to the success of your presentation!
- Thank staff for assistance before you leave and follow up with a thank-you note or letter when you are back on your campus. Your office support staff can prepare these for you, but the more you can personalize them, the better.
- Leave any additional supplies (e.g., brochures, applications) that you feel students can use, and check the school's file on your college to be sure it is up-to-date.
- Ensure appropriate and timely follow-up by you, your staff, or others back on campus (coach, academic department, financial aid office, housing). Make sure data resulting from your visit are entered in the tracking system.
- Evaluate the visit, describing activity and contacts, determining what was most and least successful, noting special items needing attention or suggestions for the next visit, estimating numbers of students seen, correcting directions, and so on.
- Reward yourself if you have time before your next visit (e.g., lunch with a friend, a frozen yogurt, cup of coffee, a stroll in the park, a shopping stop).

Travel checklist

While you will want to develop your own personal checklist, it should include many of the items listed below:

Materials

search pieces or first-contact brochures
viewbooks

contact cards
other pamphlets
catalogs
posters
business cards
campus telephone directory (for your own calls back to campus)
names and phone numbers of area VIPs and alumni volunteers
resource/training manual
table drape/banner
name badge
audiovisual equipment—videocassette/VCR/slide tray/projector
laptop computer
extension cord (with two-prong adaptor)
carrying/travel case
cart/bungee cords

Supplies

rubber bands
pencils
pens
paper clips
masking tape
3 by 5 cards
notebook paper
mini-stapler
highlighter

School information

directions to the school
area map (up-to-date, accurate, easy to read, detailed)
list of students to see
school file
contact/counselor information
visit confirmation letter
school map, if available, with room location

The school visit: The rookie

• Learn from recruitment veterans (back home and on the road) what works well in general and at specific schools.

• Allow *extra* time to find the school, park the car, and locate the office (it will always take longer when you are visiting a new school than you think).

• If you are delayed, don't panic, but do call to let them know when you hope

to arrive.

- Ask students for help in finding rooms or offices, carrying heavy travel cases, and so on.
- Don't take it personally! When school staff or students are disagreeable or unresponsive, it may have nothing to do with you, but be a result of any number of causes—bad weather, hectic schedules, too many recent visits from college reps, or a host of personal problems you can't even begin to imagine.
- Treat everyone with respect and attention, and concentrate on making a positive impression. Always remember that you are the embodiment of your college, and your success at this school visit may depend on the good will of a secretary, student aide, parent volunteer, counselor, or even the custodian.
- Comment on any unique activities at the school—a special event ('50s day), new buildings (a new theater), athletics (the big game this Friday), records (top ACT scores in the city), people (best teacher)—as a basis of conversation or to establish a connection with your college.
- Don't be afraid to let people know you are new to your job or profession. Most will be understanding and supportive and perhaps appreciate (and forgive) more because they expect less.
- Capitalize on your newness by showing enthusiasm for your job, your college, and the school and students you are visiting.
- Take the opportunity to ask for more detailed information about the school and students (is the college-bound population increasing or decreasing, going more in-state or out-of-state, to two-year or four-year colleges) and for any suggestions about other schools in the area you might visit.
- After each visit, evaluate the quality of your effort to see what works and what needs improvement.
- Remember that you accepted this job for the opportunities and challenges it offers, so have fun and enjoy them!

The school visit: The veteran

- Don't assume you know it all—this leads to "going through the motions," lack of enthusiasm, missed opportunities, absence of special attention, and no fun.
- Challenge yourself by setting specific goals for each school—increased numbers of contacts who apply, meeting with the head counselor or principal, planning special follow-up on recruitment targets (such as agriculture majors or African-American males), giving an update on the counselor's daughter who is enrolled at your college, and so on.
- Think about and act on those things that will set you apart from your competition (logo gifts for counselors, a pennant for the reference room, invitations to campus events).
- Provide special services for counseling staff (grade or retention reports on their graduates now attending your institution), and be open to requests for new ones.
- Concentrate on establishing personal relationships with key school officials. Know the names and activities of their children and even of their dogs (yes, some reps really do!), if it seems appropriate.

- Enjoy and enhance established relationships, but cultivate new staff who do not know you or your college.
- Focus on "what's new" with those who know you and your college and "what's important and special" with those who don't.
- Strive to learn more about the school and its students.
- Ask about future trends at the school related to enrollments, demographics, programs, concerns, and so on.
- Encourage contacts by school staff with you at other times, especially if they have problems or are visiting your campus.
- Utilize your experiences on your campus to provide support for your claims, add humor to your comments, reflect on your range of knowledge and influence, share common values, and refresh old acquaintances.
- Capitalize on your experience to develop your contacts by communicating at other times during the year than just during your visit (when you may be one among a hundred other reps).
- Remember that your primary goals are to maintain or increase trust in you and a positive attitude toward your college.

The successful recruitment presentation

At many recruitment events you will be expected to present a prepared speech about your institution. This may be delivered to only two or three interested prospective students, to a high school social studies or career development class, or to an auditorium full of students and parents.

Your supervisor should provide you with an outline developed for use by all your fellow recruiters and applicable for general presentation modes. It should include content and order that can be expanded, contracted, or modified depending on the size of audience, the amount of time, the special interests of listeners, their familiarity with your college and location, and so on. This is your "baseline" or "common denominator" speech; using it, you can talk for three minutes or an hour, depending on the amount of detail, examples, and explanations you have time to offer. It will usually look like this:

1. Introduction of yourself and your college—a good opportunity to personalize both.

2. Purpose of the visit—a chance to explain why you are here and what you will cover, and to ask who is in your audience so that you can tailor your comments to them as much as possible.

3. Your institution (see Chapter 2 on information about your institution).

- General: type of institution (public, private, religious), commuter/residential, reputation, etc.
- Environment: location, advantages, climate, size, enrollment, profile of students.
- Academic: majors, focus areas, special emphases, faculty, class size, facilities, recognitions.
- Uniqueness: mission, philosophy, special programs, student services, values received.

4. Applications

- Admissions: standards, form, items, deadlines, fee, interview, notification

date, intent-to-enroll deposit date.

- Financial aid: costs (tuition, room board, books/supplies, transportation, personal), forms, items, deadlines, notification date, acceptance date.
- Housing: availability, programs, form, deadlines, deposit.

5. Invitations to visit, tours, sit in on classes, overnights, special events, admissions counseling or interview.

6. Close: respond to general group questions, where to write/call for more information, complete contact card, answer individual questions, express appreciation for the opportunity to visit.

Preparing

While practice doesn't make perfect, it can take you a considerable way in that direction. Practice your presentation in different situations: in front of colleagues for feedback, to a camcorder for video playback (very revealing!), in your car while commuting or traveling. After a while, you can file your outline and notes because the content will have become second nature to you. The better you know your material and the more critiques you receive from friends, the greater your confidence as you make your presentation to "real" audiences.

The suggestions below will help you as you approach the presentation environment:

- Check out your facility before "showtime" (especially audiovisual equipment if you use it).
- Be flexible regarding last-minute adjustments or opportunities (e.g., using a sign-up sheet if your contact cards don't arrive, working in the comments of an alumni volunteer who unexpectedly shows up).
- Secure valuables (purse) and put equipment (audiovisual, travel case) and materials (table drape) where you can see them.
- Look and act like the professional you are: Have materials prepared and organized; be rested and alert; look good, smell good (no alcohol), and be good!

The opening

- Obtain early positive audience réSponse to involve and relax them and give you reinforcement (for example, ask some questions for a "show of hands").
- Indicate whether you will take questions during or after your presentation.
- Make sure that you can be heard (and your visuals seen) by all present (even seasoned presenters have problems along this line).

The audience

- Maintain direct eye contact.
- Focus on those who are positive or neutral.
- Evaluate your audience—each is different. Expand if they are responsive. If they appear indifferent or even hostile, try different devices; if nothing works,

say it short and stop. With a small audience, personalize and individualize.

- Add humor and drama. Use what has worked for you and others; talk about what gets you excited; don't act it, be it.
- Develop *audience-oriented delivery techniques:*

  Involve your audience (e.g., ask questions, "How many of you are seniors? ...juniors? ...know where my college is located? ...have visited my campus?")

  Take some risks.

  Introduce ideas in dramatic and visual ways.

  Interact with your audience rather than just talking at them.

  Tell "stories" (describe experiences) about yourself or others that relate to your point rather than telling jokes.

  Consider visual aids (overheads, videos, flipcharts) that might enhance your message, but practice to use them well and be prepared, if necessary, to do the presentation without them. Also consider their cost, portability, and liability (if they are lost or stolen).

  Consider using your publications (brochure, viewbook, campus map) as presentation outlines.

- Adjust your presentation to special audiences; connecting with rural high school freshmen, urban gang members, and returning adults may require radically different approaches to command attention, maintain interest, speak to unique concerns, and stimulate response or action. Significantly changing demographics in various areas may require you to devote considerable time to developing creative and effective methods to connect with nontraditional prospects and their influencers. Look to other professional colleagues for advice.
- Respect and enjoy your audience; make them feel that you feel privileged to be speaking to them and happy to be there.
- Feel (and you will show) enthusiasm for your college and your audience.

Tricks and tips

- Voice: your best tool, but all too often the most ignored:

  Vary rate, pitch, volume; experiment at home in front of a mirror and tape recorder to see what works.

  Use verbal punctuation: question, exclamation, underline.

  Critique your voice on a tape recorder or your presentation on video.

  Use pauses for emotional impact, transitions, laughter, or to give the audience time to think about what you are saying.

- Use simple words and avoid collegiate jargon (especially when you are talking about financial aid).

- Practice to avoid distractors—"well," "um," "you know," "ah."
- Watch your body language: Use good posture. Maintain a straight line from your head through your spine and maximize your air intake—and your confidence. Hands are your best visual tool; use them naturally, spontaneously.
- Your face is your most expressive part—especially your eyes, forehead, and eyebrows. Let your expressions complement your words.
- If you are speaking after others have spoken (perhaps at great length), ask your audience to stand and stretch for a few minutes before you begin your presentation. Everyone will benefit.

At the end of your presentation

- Stay within your allotted time limit.
- Before you answer a question, repeat or rephrase it (especially if the audience is large) so that everyone can hear.
- Be available afterward to answer individual questions, set up visits, target special recruitment contacts, record follow-up information to be sent or contacts to be made.
- Solicit comments from key listeners, especially counselors.
- Pack up all your materials—brochures, contact cards, and equipment—and leave your area the way you found it (or better).
- Consider asking someone to be a companion or escort if you are there late at night after everyone else has left.
- Review your presentation to see what you did well and where you can improve.

Follow-up

Effective recruitment means much more than what you do during school visits. While they provide the opportunity—maybe the only opportunity—for face-to-face contact with prospective students, parents, and counselors, much of your impact on prospects' decision-making will occur during the follow-up process.

In the weeks and months following your direct contact, you and your office support staff will engage in systematic follow-up to achieve the following purposes:

- Confirming and reaffirming your institution's interest in the student.
- Building upon new or continuing friendships (especially with school counselors or officials).
- Establishing your credibility: You show that you care when you follow through on promises to remain in contact, send requested materials, have other campus departments (academic, financial aid, athletic) make responses, and so on.
- Providing more information to students and parents and increasing students' motivation to apply and enroll at your institution.

On the day of the school visit or the day afterward, plan time to complete the paperwork necessary for additional action. Visit evaluation forms or contact cards can help streamline the process; you can mail them or take them back to campus

for support staff follow-up. Some recruiters use a laptop or hotel-supplied computer and modem to transmit inquiry data to the central office computer or even the campus mainframe for loading into the tracking or other response system. For special handling or urgent items, you may want to make a phone call and ask for a FAX back.

When you are back on campus, you will probably need to do some or all of the following:

Update the school file:

- Contact information on school counselors, administrators, teachers, and volunteers.
- Accurate directions to the school, where to park, and where to go once you are at the school.
- Current statistics on the school. Ask the counselor for information such as a senior class profile, list of institutions where last year's graduates enrolled, and so on.
- Recommendations for maintaining or improving future visits.

Follow up on school contacts:

- Send any additional materials to maintain the school file on your institution—catalogs, brochures, or any requested items (pennants, basketball schedule, alumni magazine).
- As soon as possible, write a thank-you letter for the arrangements that were made and the time school personnel spent with you. For expediency, use standard letters from your word processor, but personalize them as much as possible.
- Put contacts on your mailing list to receive your institution's regular mailings.

Follow up on students contacted:

- Complete requests for materials.
- Send referrals to appropriate departments.
- Place names on the list for student, alumni, or faculty contact via letter, telephone, or visit, depending on your programs.
- Have relevant data input to your tracking system.

Follow up with your own staff:

- Complete a brief written report on your school visit for your supervisor, including anecdotal material.
- Debrief with peer and support staff and share the excitement, challenges, humor, and problems.

Follow up on applications: When a student's application for admission has been received pursuant to your visit to his or her school, it's important that you follow up in at least some of the following ways:

- Acknowledge receipt of the application.
- Request any missing credentials—test scores, transcript, and so on.
- Send any additional materials needed—housing or financial aid application; campus open house or special events schedule, etc.
- Call to explain the admissions process, answer questions, and confirm interest.

Follow up on acceptances: When the student has been accepted to your institution, consider these follow-up options:

- Send a letter of congratulations from the director of admissions, respective academic department chair, vice president, or the president.
- Have a currently enrolled student call.
- Send a letter to the counselor announcing acceptance.
- Ask an alumnus in the student's geographical area to make contact.
- Send a letter or special brochure to the parents.
- Forward a college video, particularly if you have one that provides orientation to the campus for new students.
- Invite the student to a campus program.
- Invite the student and his or her parents (if appropriate) to an area alumni program or party.
- Send appropriate publications such as the student newspaper and alumni magazine.
- Plan a home visit to meet the student's family and address any concerns they may have.

Follow up on deposits: Once the deposit has been received, some follow-up actions might be:

- Send a welcome letter from the student government president.
- Send a souvenir with your institutional logo—decal, key chain, notepad.
- Invite the student to summer orientation.
- Send a letter or other information outlining enrollment procedures.
- Send an announcement to the newspaper in the student's geographical area.

Much of your follow-up activity should be dictated by the overall institutional marketing plan, so you should learn early on what you are expected to do and what your office staff will do. Your institution may have a sophisticated tracking system that generates letters and materials automatically. But no matter how advanced your office is, consider what personal touches you can add that will make the difference to those students you feel deserve your extra effort.

On the flip side, think carefully about what you're doing from the student's point of view. If follow-up is uncoordinated or overdone, the student may feel that your college is disorganized—or desperate. Inappropriate information, timing, tone, or coordination may have a negative impact on yield.

Chapter 7

Survival and Success: Present and Future

When you took this position as an admissions recruiter, you became part of a much larger organization of admissions professionals on your campus and across the nation. Yours is definitely more than an isolated job: It has great potential for career growth in higher education whether you stay in admissions or transfer to another part of the institution. While the other chapters in this book focused on skills development, this chapter will provide hints toward becoming a successful professional.

Looking like a professional

What about appearance? If this is your first professional position, you will need to own the basics of a wardrobe that will help present you and your institution most effectively. Your favorite clothes from college days are probably not appropriate anymore (and may be pretty shabby by now). Observe what your peer employees are wearing at different types of functions. When you are planning to give a presentation at a high school, you will need to dress more formally than if you are meeting with a group of students at a weekend retreat. If frequent traveling will be a requirement for your position, consider what kinds of clothing (styles, materials, weight, coordination, etc.) will travel well, as well as what you will need for different climates.

Chat informally with the other recruiters for guidelines and suggestions about dress. When you have a style in mind, you may want to consult a personal shopper or knowledgeable salesperson in one of the larger clothing stores to gain valuable advice on building your wardrobe for now and the years ahead. In general, go for quality, durability, and "classic good looks" that won't go out of style next season. View purchases of clothing, shoes, accessories, and so on, as investments in yourself and your future. They are!

Your boss

The most important person to you is the person to whom you report. You need to determine if what he or she said during the interview process will hold up now. Find out early what the expectations are and get a copy of your job description. Based on your initial meetings, establish work goals for yourself for the first month, the next six months, and the year. Find out what the probationary period is for new employees and how and by whom you will be evaluated.

Seek advice early. Try to schedule a regular time (weekly, biweekly, or monthly) to meet with your boss one-on-one. It isn't as important that the meetings be frequent as it is that they be regular. While informal interaction is also important, it should not substitute for regular standing meetings. Admissions offices in particular have staff members who do not see each other on a formal basis during the high recruiting season, so planned standing meetings are essential to keep you informed and keep others informed about your progress and challenges. These meetings provide time to deal with the larger, long-term issues rather than the crisis of the moment and enable you to work on one of the more important dimensions of your job—your relationship with the boss.

Be prepared for these meetings. Bring an agenda or outline of topics you want to cover so you won't forget an item. Your boss will want to be updated on projects you have been assigned. You needn't go into tedious detail here, but try to cover the important points that your boss will need to know in responding to questions from his or her peers. You may want to ask some questions about other projects you are working on (or would like to work on) and to get necessary approvals before you proceed further. Lastly, be sure to ask if your supervisor has any questions about your work. Remember, these meetings are not times for social conversation. If the latter occurs, let the boss take the lead, not you.

Perform quality work. Whether you are responsible for recruiting a targeted population (such as top scholars) or writing recruitment publications, your tasks must be completed accurately and in the best form you are capable of producing. The more you can personally accomplish on your own, with your boss only having to sign off on the concept or add his or her signature to a document, the better. This is not to say you shouldn't check with the boss more frequently on a new project to be sure you are on the right track. However, for more routine projects, the more you can complete so that it relieves someone else from a pressure situation, the more you will be viewed as competent and able to complete assignments well.

Complete the assignments on a timely basis. Quality work is not worth anything if it is a day late. Admissions offices place special emphasis on getting projects done in a specific time sequence as many projects must be coordinated and completed simultaneously. The success of the event or project depends not only on the accuracy and quality of your work, but also on its timeliness.

Coordinate and communicate with others often. Never forget that you are part of a departmental—and institutional—whole. Suppose you had planned a major outdoor event on the center campus lawn and somehow neglected to communicate and coordinate with the Physical Facilities Department; this meant that you failed to learn that the staging area you were planning to use for your program would be fertilized the day before the event. You can never over-communicate with departments and individuals when you are planning events. Also, the amount

of coordination needed is often overlooked. You and other staff should consider each aspect of the project and determine if other individuals or departments should be made aware of your plans or even be a part of the planning process. You can be assured that the boss will frequently ask about coordination with other offices. It is far better to send one too many announcements or reminders to multiple locations than to leave out a key office.

The farther you advance, the more you will understand why accurate and quality information, coordination of efforts, and timeliness are so important. Each supervisor is required to complete multiple projects, which are often quite complex and require follow-up in a timely manner by a number of subordinates like yourself. Remember your boss's priorities, and make sure that you communicate accurately and promptly about those assignments given directly to you by your boss. One of the worst things that can happen is that you lose your credibility because you have provided inaccurate, late, or incomplete information.

Your support group

Your support group includes secretarial staff, student assistants, and peers who are your colleagues. More than one secretary has saved the job of a college admissions person. When your job demands your attention out of the office and off campus, the secretary is your voice and presence back in the office. How well you two communicate and understand each other's roles will be, in large measure, a key to your success. That goes without saying for student assistants and your peers as well. Keep people updated about your projects; this will enable them to coordinate their projects with your schedule and will also inform them about the types of pressures you may be encountering. The kind of relationship you establish with these people is vitally important. They can be part of a truly supportive team, or they can cause havoc when you are under the most stress.

Your student friends

You need to understand your new relationship with students. While you may join students for certain events, you are no longer one of them. Regardless of age, you are perceived (and rightly so) as an official representative of the institution, and your behavior will be judged on that basis. Be aware of the institutional policy (written and unwritten) and the culture of the institution regarding social interaction with students. Some colleges encourage informal interaction, while others clearly state that after-hours or weekend gatherings should be for official functions only. Be sure to ask several of your colleagues as well as your boss if you have any questions about a situation. Although your age and interests may be closer to those of students than of your peer staff, in fact you are no longer "one of the gang." It's important to understand this distinction and to learn to live with it, however difficult this may be.

Your volunteer groups

One of the very best elements of your team can be the volunteers who are assisting you. Remember they have chosen your admissions office out of all the possible things for which they might have volunteered. Even if the volunteers are not working directly with you, find the time to learn about volunteer roles in the office, how individuals are selected, and how you should interact, if at all, with the group.

Most often, volunteer groups are composed of an alumni network or a student ambassador group. The alumni typically represent your institution in their local areas. They may host events at their homes, represent the alma mater at college fairs, call prospective students, and assist with yield activities.

Student ambassadors often lead campus tours, serve as student hosts at major recruitment events, give presentations to high school students, and assist with new student orientation. Other volunteers might include parents of students or faculty who have a significant role at different stages of the recruitment cycle. All of the volunteers can greatly enhance the recruitment effort through their own specific experiences and their perspective on the institution. Working with and or coordinating volunteers can be very rewarding, but also has its downsides. Success with volunteers requires specialized skills (e.g., motivation, patience, tolerance of lack of control) that you can learn from other staff members and from your experience.

Careers in admissions

If you find that you are developing the skills and talents needed for admissions and that you enjoy the kinds of work involved, you may want to explore other positions in the office or in the field in general. The skills you attained as an admissions recruiter will provide a strong foundation for many other positions. Interpersonal skills are key—from speaking to large groups of people to one-on-one counseling advising. The ability to organize events and follow up in a timely manner is also critical to many positions. Organizing one's day, initiating and developing programs, setting goals, and meeting deadlines are highly prized skills.

You can observe within your own operation a variety of positions in the admissions field. You could advance to assistant, associate, or director positions, which involve more emphasis on coordination of programs and services. They also entail skill in management and supervision of staff as well as responsibility for fiscal matters. Or you might like a particular aspect of admissions and wish to become a specialist in, for example, marketing, computer database management, office operations, publications, and so on.

You may want to consider positions in other enrollment service offices (such as financial aid, records, residence life, and student data systems) or student services, or the larger field of institutional advancement where you might work in areas such as fund raising, community relations, governmental relations, special events, or the news bureau.

Hard work

As you begin considering new positions, do not overlook your present assignments and obligations. People who are busy trying to impress the boss, but neglect their daily responsibilities, usually don't get the promotions. Again, your first priority should always be to complete your present tasks accurately and on a timely basis. The professionals who move ahead are those who volunteer willingly and follow through. Be a positive, strong, contributing member to the total office effort. That might include physical as well as intellectual labors. Admissions work involves transporting and setting up materials for recruitment events. It means preparing mass mailings, looking up files, and following up on multiple requests. Team members quickly learn which staff slight their responsibilities and blame others for their shortcomings. For respect and advancement, flakers and whiners need not apply.

Good work

As a complement to hard work, quality is vital. Follow-through and attention to detail should be your bywords. Learn the importance of keeping your boss informed, not only of your progress and your successes, but also of any potential landmines. When you bring a problem to your supervisor, be sure to offer options for resolving the problem and any positive action you have already taken. Learn the importance of solidly written reports and evaluations. If you are not a good writer, take steps to become one. For any program you plan, be sure to write an assessment and recommendations for the next cycle or year while the event is still fresh in your mind. If you are doing the program the next year, it will give you a head start. If you have moved on, you'll be leaving a great foundation for the new person.

Teamwork

If you are used to meeting goals independent of others, you need to reconsider your working style when you enter the admissions profession. The entire admissions process from initial contact through enrollment relies upon an interconnectedness of all staff and programs. As a member of the team, you need to understand the mission and goals of the department and work enthusiastically with others in the department to implement the strategies. Open, honest, and frequent communication are vital to success. Since many on the admissions team will be traveling and or planning separate events, you need to keep in mind the whole picture—how all of the separate activities and events fit together. This is true even if you have worked in admissions before. Each institution has its own unique priorities and operating procedures for how the work should be completed, and you need to know these.

At peak times everyone needs to pitch in and help on some major project, regardless of who has direct responsibility for it. Find out early exactly what these events are and note them on your planning calendar. This will enable you to

plan accordingly and become a productive team member as you learn your job. Willingness to pitch in and help others demonstrates your commitment to the team and to do what is needed for the success of all its members and the office.

Network

After you become comfortable with your job assignments, you can begin to branch out and meet others within your division in similar or related positions. You should also begin to recognize those across campus who may be critical to your success. Schedule some time with these people so that you can become better acquainted with them and learn what their positions entail. Determine how you could work on projects together.

Learn about professional associations on your campus and in your state. (Be sure that your boss supports this type of involvement before you venture too far.) Once you become more involved in these associations, you will find a broader professional network for sharing ideas, receiving critiques, and learning about career opportunities in other geographical areas. National professional associations that specifically focus on admissions and enrollment issues include:

- AACRAO: American Association of Collegiate Registrars and Admissions Officers;
- NACAC: National Association of College Admission Counselors; and
- CASE: Council for Advancement and Support of Education.

Each of these associations has regional and often state groups as well. While your director may be attending the national meeting, you can begin to be involved at the state and regional levels. You might work on committees, assist with conference planning or arrangements, and make professional presentations. You may have to do some of this on your own time rather than on job time. Ask your boss about institutional policies on this point.

There are other opportunities for professional growth. Watch for seminars or workshops offered through your college or other affiliated associations. You may be interested in a women's professional group, a community leadership organization, or a minority network. All of these can help you enhance and develop your strengths and improve your skills. They can put you in contact with people who may become some of your closest professional colleagues. Colleagues off-campus can be a source of revitalization for you, both personally and professionally. They can share common concerns and warn you of unexpected pitfalls in certain situations. Their counsel may save you both time and embarrassment.

Mentoring

In one sense, you can learn about other positions and administrative styles simply by being an astute observer in your own department and division meetings. What are the elements necessary to be a successful professional? Whom do you admire? Why? Are these particular talents, skills, and attributes ones to which you aspire? Sometimes we admire people in other positions, but are realistic enough to know that we would not really want their jobs. If you aspire to a much more senior position, try to discern from your current stage in your career what sort of position

will be the best fit for you.

In addition to observing, you may want to choose one or more mentors, your boss, for example, or another senior member of your department, or both. Others in your division or institution whose insight you would like to have can fill the mentoring role.

Your mentor can also be someone from off campus—a former boss or colleague, a friend who you feel provides you with an objective evaluation and can suggest advantages and disadvantages of a potential move, without knowing all the details or politics. While this feedback can give you a different and valuable perspective, you should not depend on it as the sole perspective in your decision-making process. Be considerate in your use of your mentors' time. Acknowledge their time and commitment to you. Listen carefully to their suggestions and recommendations. Mentors can provide feedback, encouragement, and honest opinions about your prospects for advancement.

Personal considerations

Personal factors are always a significant part of any career decision. If you have a spouse and other dependents, you'll need to consider how the move will affect them as well, and what role they will have in the decision-making process.

Geographical location is always an important consideration—where the institution is located, its proximity to a metropolitan or rural area, climate, access to good schools if you have children or a graduate program for yourself, and other quality of life issues.

If you are considering a new position that will be a move up the career ladder, you should ask others in positions similar to the one to which you are aspiring what the significant differences are between what you are doing now and the expectations of the new position. For example, will you be less involved in program development and coordination and more focused on staff supervision and goal setting for the office? Will you have more or fewer travel commitments? Will you have less daily contact with students and more emphasis on paperwork and policy issues? Will you be giving fewer admissions presentations and, instead, attending more campus committee meetings?

If you are choosing a new institution as well as a new position, what can you learn about the work culture of the new institution and, in particular, about the specific division and department in which you would be working? Are there any other potential changes in the department or institution that will be occurring at the same time as your arrival? Is the institution facing any special challenges—downturn in enrollment, changing from a single-sex institution, major effort to downsize, and so on?

After you determine that you like the position, what are you willing to accept in terms of salary level and benefit packages which include health insurance, retirement, vacation and sick days? You may want to ask whether the institution covers moving costs. However, don't be dismayed if it doesn't; moving costs are more frequently covered only for people hired for senior positions.

Probably no one aspect will or should be the deciding factor. However, you should try to consider the full dimension of the potential position, the geographical move when applicable, the salary and benefits, the difference in the position itself,

and the impact on your significant personal support group, especially your family.

Now and the future

Even as you prepare for the future, enjoy the present. Whatever part of the admissions role you play should be both exciting and challenging to you. You have a key position in helping prospective students and their families make important decisions about higher education. Don't become so involved in planning for your future that you overlook the joy of the present.

Glossary

This glossary defines the terms commonly used across the admissions profession that you may hear frequently. Please keep in mind that these are "generic" definitions, that is, general understandings of their meanings as used widely throughout the United States. As a new admissions professional, you will want to become familiar with many of these terms. But more than that, you will want to learn the specific definitions that apply at your own institution. For example, while you may know the general meaning of "International Baccalaureate" or "concurrent enrollment," you should also know your institution's particular policy regarding these concepts. Some campus-specific definitions may vary considerably from broader usage in the profession. And you'll find that other institutions may define or apply them somewhat differently as well. When in doubt, ask your peers or supervisor.

academic advising: assistance from faculty or professional staff to help the student choose (based on an evaluation of courses taken, including transferred courses) and register for courses leading to a chosen academic degree and career.

achievement tests: tests offered by the College Board that measure content knowledge in selected discipline areas; may be required for admission by some institutions.

admission: acceptance as a student for a degree program who may enroll for classes, pay fees, earn credit, etc.

admission certificate/notice: the notification, usually mailed, confirming an applicant's approval for admission.

admission (eligibility) index: a combination of academic indicators (e.g., GPA or class rank and test score) used as an admission standard.

admission standards/requirements: minimum criteria that applicants must meet in order to be admitted.

Advanced Placement (AP): a series of tests that high school students can take to receive college credit, or the courses designated to prepare them for these tests.

alumni rep: an alumnus who volunteers to represent his or her college or disseminate information in a variety of settings (e.g., college night).

applicant for admission: one who has submitted an application and fee to be considered for admission; completion of the application process may require additional materials for evaluation for admission (e.g., transcripts, test scores).

application fee (and waiver): amount of money (nonrefundable) that the applicant must send with the application to be reviewed for admission; some institutions may grant waivers for economically disadvantaged students.

articulation agreement: a list of academic courses that two institutions have agreed are of equivalent academic content and credit, usually for determining fulfillment of graduation requirements; most useful for a community college student who is planning to transfer to a baccalaureate institution and is selecting courses to meet its graduation requirements.

average college costs or budget: the total estimated academic-year costs of attending an institution, including registration fee, tuition, room and board, books

and supplies, transportation, and personal expenses; will vary depending upon whether the student lives on- or off-campus; used to offer cost comparisons among institutions.

career placement: services to prepare and assist students to find jobs and fulfill career goals.

CLEP (College Level Examination Program): a series of tests by which people (often nontraditional) can earn college credit; acceptance varies by institution.

college fair: an event at which college and or alumni admissions representatives from several institutions are available to provide information to prospective students and or their families; it could occur at a high school, community college, business, civic organization, etc.

college night: an evening college fair.

college prep courses: courses having specific academic content (e.g., algebra, English) required as minimum preparation for admission.

college rankings: the relative position of institutions that are supposed to be the best in given categories (e.g., regional liberal arts) as determined annually according to criteria of a variety of publications; such recognition of your college may be an element of your marketing effort.

common application form: a single form used by more than one institution; a student can file for financial aid at nearly any school on one or two common forms, while common admission forms are usually used by campuses within the same "system."

concentration/specialization: an area usually within a major that clusters selected courses around a common theme, focus, or orientation.

concurrent enrollment: a special registration category that allows a student to enroll for courses although that student is not admitted to a degree program and may be enrolled at the same time at another institution.

co-op education: a program in which students are placed in career positions where they learn skills and knowledge, gain experience, and receive a salary and perhaps academic credit.

credential program: a specified group of academic courses and perhaps other criteria (e.g., student teaching) that result in meeting the standards of an external agency related to professional qualification or recognition (e.g., teacher certification); may or may not be related to completion of degree requirements.

cultural diversity/pluralism: broad representation of various cultural and ethnic groups for the enrichment of the campus climate.

deficiencies: areas in which an applicant is lacking and that must be made up prior to or following enrollment (e.g., a math course).

demographics: the social science of studying characteristics of people in groups (e.g., where they live and come from, who they are, statistics relating to them and their behavior).

denied: rejected for admission.

deposit: a fee required to confirm an admitted applicant's resolution to enroll; see intent-to-enroll; could also apply to other confirmation fees (e.g., for housing).

direct mail: targeting individually mailed letters or publications to prospective students who fit predefined qualifications to elicit interest, application, or enrollment.

disadvantaged: those who through lack of economic or educational oppor-

tunity do not have full preparation for or access to college-level admission and academic success.

early action: a program in which the applicant applies to the institution of top choice and receives a decision well in advance of regular spring response dates.

early decision: a program in which a commitment is made by the applicant that, if admitted, he or she will enroll at the institution.

early outreach: efforts to educate and motivate elementary school students to higher education opportunities and advantages.

early semester system: fall semester starts around mid-August, and spring semester extends through mid-May.

educational equity: having percentages of particular classes (e.g., ethnic or gender groups) enrolled in the campus population proportionally equal to their percentages in the potential applicant cohort or in the general population.

ethnicity/ethnic identity: a person's self-identification (sometimes with required documentation) as to race/culture, usually requested during the admissions (optional) or registration process.

exchange student: a visiting student, often part of a formal academic program or contract with another college, who enrolls for courses at the host institution for a limited period of time, but plans to return to and graduate from his or her home institution.

faculty/student ratio: number of students per faculty member (e.g., 1:20), derived from head-count enrollment divided by total faculty; used as an indicator of personal attention a student might expect from faculty (e.g., the lower the ratio, the more attention).

fee payment: cash, check, money order, credit card, financial aid, etc., payment that allows the student to register for courses and entitles him or her to other services and programs of the institution.

filing period: inclusive dates of a period during which applications for a given term are accepted for maximum consideration (e.g., November 1 through 30 for admission to fall quarter the following year).

financial aid: loans, grants, work-study, and/or scholarships used to pay for various costs associated with attending college, awarded by the institution; may be need-based or not.

GPA: grade point average, where usually A = 4.0, B = 3.0, C = 2.0, etc.

general education/certification: areas of course work (e.g., social sciences, science and mathematics, humanities, fine arts) required for graduation that provide academic breadth and depth; certification means these areas have been evaluated as being completed.

guaranteed admission: when a prospective student is promised admission contingent upon fulfillment of specified criteria (e.g., a minimum GPA, number of courses, etc.).

high school equivalency test: a test (e.g., the General Educational Development test or G.E.D.) that, if passed, is accepted as demonstrating the equivalency of graduating from high school.

immediate outreach: recruitment of high school juniors and seniors and community college transfers to apply and enroll at an institution of higher education, usually within a year.

immunization: inoculation or other method to prevent contraction of an

infectious disease; a requirement related to measles rubella at many colleges.

impaction/oversubscription: a condition at an institution or within a major where the number of applicants exceeds spaces available.

intent-to-enroll/register: indication by the response reply date that an admitted applicant plans to enroll or register, often accompanied by a deposit.

intermediate outreach: efforts to educate and motivate freshman and sophomore high school students to higher education opportunities and advantages.

International Baccalaureate: a formal academic program that offers an approved curriculum equal to college prep courses and a college-level entrance exam; it can be taken in many countries (and U.S. high schools) and is recognized worldwide; some college credit may be granted.

internship: a structured, time-specific learning assignment taken for academic credit with defined parameters and outcomes, often off-campus.

learning disabled: one who has been certified through testing as having identified learning disabilities (e.g., dyslexia).

legacy: the child of an alumnus.

major: a student's primary academic concentration as defined by courses (content and quantity) in the same or closely related departments.

marketing plan: the overall strategy by which an institution seeks to recruit its applicants; it is the product of demographic research, data-based decisions, and evaluated methodologies to attract and enroll students with optimal qualifications as defined by the institution.

matriculation: after admission, enrolling in courses leading to completion of a degree.

minor: an area of lesser academic concentration, different in content from, but can be related to, the major.

nontraditional student: one who differs from the profile of typical college-age students (e.g., older, disabled, or ethnic minority); outreach strategies to this kind of student tend to be very different as they must respond to the needs of each unique group or even individual being recruited; see returning re-entry student.

official transcript: a copy of a student's academic record that has been verified, usually by an institutional embossed seal; an unofficial transcript is not so verified and will usually not be accepted by admissions offices.

open house/preview day: an on-campus recruitment event when a college hosts prospective students and their families to showcase the campus, including tours, academic programs, faculty presentations, food and entertainment, sports events, etc.

orientation: programs usually preceding the start of classes that help admitted students prepare for a successful academic, environmental, social, etc., adjustment to college; orientation may include social activities, advising, campus visits and tours, registration, and educational activities.

placement tests: tests to determine at what level or in what specific course a student should enroll, particularly in English, mathematics, and foreign languages.

post-bac student: a holder of one baccalaureate degree who enrolls for a second degree.

privacy act ("Federal Educational Rights and Privacy Act" or "Buckley Amendment" or "FERPA"): a 1974 federal law guaranteeing enrolled students

confidentiality of and access to their academic records, including all information related to a student's history and results of enrollment in courses plus any other information (e.g., residency data, counselor notes, disqualification actions) in the student's institutional record files.

private/independent/proprietary institution: an institution with no governing or fiscal ties to state or local government; may be a for-profit or not-for-profit institution.

prospect/prospective student: a person who has the potential of becoming a student at a particular institution.

provisional/conditional admission: the status whereby a student will be fully admitted if he or she fulfills one or more conditions (e.g., completes a specified course, forwards a final transcript).

public institution: one that is governed by a publicly appointed or selected board and funded in whole or in part by tax dollars.

quarter system: an academic calendar that divides the academic year into three roughly equal three-month periods; the summer quarter often equals each of the others in length.

rank in class: a student's academic standing vis-a-vis others in the class (e.g., upper 10 percent, 75th percentile, 25 out of 134).

regional rep: an admissions recruiter who lives in a geographical area distant from the institution he or she represents, who functions primarily in that region (e.g., a "West Coast" regional rep who lives in San Francisco and recruits for a New England college).

registration: selecting and enrolling in classes and paying appropriate fees to earn academic credit for them.

rep: representative.

residency: at public institutions, the determination by review of evidence (e.g., driver's license, tax statements, voter registration, etc.) of the intent of a student to live or establish permanent residency in a given state for the privilege of paying lower tuition; often, a year or longer is required once intent has been determined before lower fees ("resident" or "in-state") are approved.

returning/re-entry student: a nontraditional student who is "older than average" (usually 25 or older) and/or has once been in college and is now enrolling or planning to enroll.

roadrunner/road warrior: an admissions recruiter who travels extensively.

rolling admissions: a method of admissions processing in which applicants are admitted or denied when their materials are complete and reviewed, right up to (or through) the beginning of classes.

selective admission: admission based on specific criteria by an institution with more applicants than spaces for them; can be institutionwide or by major.

semester system: an academic calendar in which a student enrolls for an approximate four-month period in both fall (e.g., mid-September through mid-December) and spring (e.g., mid-January through early June); a summer term is usually shorter; see also early semester system.

special admit: a student who does not meet regular admissions requirements, but whose special skills, preparation, advantages, etc., meet alternative and/or equivalent criteria.

student profile: a data-based description of characteristics of an institution's student body (e.g., 57 percent female, 43 percent male, who live within 100 miles

of campus, rank on an average at the 75th percentile of high school graduating classes, etc.).

student reps/volunteers: enrolled students who volunteer to participate in recruitment efforts (e.g., making school visits, giving campus tours, meeting prospective students).

supplemental admissions requirements: additional criteria that certain groups of applicants (e.g., international students) must meet.

telemarketing: recruitment effort in which representatives of an institution (e.g., admission staff, alumni, student volunteers, faculty) contact prospective or admitted students by telephone to interest them in applying or to confirm their enrollment.

test scores: most often, scores earned by students completing either or both of the two major college aptitude tests, the SAT (Scholastic Aptitude Test) or the ACT (American College Test); could also refer to any other aptitude or placement test scores.

TOEFL: Test of English as a Foreign Language, administered to non-native speakers of English to measure their English language proficiency; many colleges have TOEFL cutoff scores required for admission.

transcript: a copy of a student's academic record.

transfer day: a day when college reps visit a community college to meet with prospective transfer students.

transfer student: a student who begins at one college and intends to enter or has been admitted and/or enrolled at another; a lower-division transfer student is one who transfers at the freshman or sophomore level; upper-division, at the junior or senior level.

transferable courses: academic courses and units at one institution that are acceptable at another; may or may not count toward specific degree requirements.

trimester system: an academic calendar that divides the year into three roughly equal four-month periods; summer trimester equals each of the others in length.

underrepresented: a lower percentage of members of a particular class (e.g., women, ethnic minority) compared to the enrollment than the percentage who exist in the applicant cohort or in the general population.

visiting/unclassified/transient student: an admission/enrollment category describing nonmatriculating (non-degree-seeking) students who seek a limited number of courses for career advancement, personal interest, etc.

wait list: names of applicants who may be admitted depending on the number of admitted students who confirm their intent-to-enroll by the reply date.

yield: the ratio of one group to another (e.g., applicants to admitted applicants, admitted applicants to enrollees); a critical measure of recruitment effectiveness and of projecting a given term's future enrollment.

yield activities: types of recruitment efforts designed to increase yield (e.g., a regional party hosted by alumni volunteers to increase the enrollment rate of admitted students).

Appendix: Statements of Ethics

Code of Ethics

The American Association of Collegiate Registrars and Admissions Officers, vitally concerned with the advancement of postsecondary education, has adopted the following code of ethics exemplifying those qualities and attributes which have distinguished members of the Association both past and present.

A Belief in, and Loyalty to, the philosophy and goals of the profession and the institutions we serve.

An Understanding of, and Respect for, the civil and human rights and responsibilities of all individuals while supporting and protecting the principles of due process and confidentiality.

Adherence to the principles of equality and nondiscrimination without regard to race, color, creed, sex, age, handicap or national origin.

An Ability to represent an institutional or association perspective without vested interests or personal bias.

The Courage to experiment with procedures and to initiate policies which support the goals of our profession.

A Willingness to assert ourselves when policies or practices are proposed which seem to be contrary to the philosophy and goals of our profession and our institutions.

Responsive Participation and Contributions to professional activities and their development to insure effective and efficient management of resources, data and personnel.

Presentation of an accurate interpretation of our institution's admission criteria, educational costs and major offerings to assist prospective students and their parents in making an informed decision.

A Sincere Effort to assist in improving educational standards and evaluative methods so that grading is meaningful in reflecting the academic achievement of students.

A Sensitive Appreciation of the dynamics of interpersonal relationships when dealing with students, parents, faculty, administration, associates and the public.

A Commitment to effective management systems which will insure integrity, confidentiality and security of institutional records and an accurate interpretation of such information.

A Dedication to ideals and principles in developing student's talents and interests so they may become responsible contributors to the improvement of society.

The Practice of Honesty and Integrity in all our activities.

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CASE Statement of Ethics

Institutional advancement professionals, by virtue of their responsibilities within the academic community, represent their colleges, universities, and schools to the larger society. They have, therefore, a special duty to exemplify the best qualities of their institutions and to observe the highest standards of personal and professional conduct.

In so doing, they promote the merits of their institutions, and of education generally, without disparaging other colleges and schools.

Their words and actions embody respect for truth, fairness, free inquiry, and the opinions of others.

They respect all individuals without regard to race, color, sex, sexual orientation, marital status, creed, ethnic or national identity, handicap, or age.

They uphold the professional reputation of other advancement officers and give credit for ideas, words, or images originated by others.

They safeguard privacy rights and confidential information.

They do not grant or accept favors for personal gain, nor do they solicit or accept favors for their institutions where a higher public interest would be violated.

They avoid actual or apparent conflicts of interest and, if in doubt, seek guidance from appropriate authorities.

They follow the letter and spirit of laws and regulations affecting institutional advancement.

They observe these standards and others that apply to their professions and actively encourage colleagues to join them in supporting the highest standards of conduct.

The CASE Board of Trustees adopted this Statement of Ethics to guide and reinforce our professional conduct in all areas of institutional advancement. The statement is also intended to stimulate awareness and discussion of ethical issues that may arise in our professional activities. The Board adopted the final text in Toronto on July 11, 1982, after a year's deliberation by national and district leaders and by countless volunteers throughout the membership.

NATIONAL ASSOCIATION OF COLLEGE ADMISSION COUNSELORS

Statement of Principles of Good Practice

Revised October 1992

Ethics in recruiting students and awarding scholarships provided the impetus for creating NACAC in 1937. As a reflection of that major purpose, one of the first actions taken by the founders was the creation of a Code of Ethics. After many years of reviewing, updating, and rewriting, this Code is today's *Statement of Principles of Good Practice*.

While the Code originally applied only to NACAC members, the importance of ethical practices in the admission process for all institutions was recognized by those in the profession. As a result, a joint statement utilizing the basic philosophy of NACAC's Code of Ethics was developed in tandem with the American Association of Collegiate Registrars and Admission Officers and The College Board, and was endorsed by the American Council on Education, the National Association of Secondary School Principals, the United States Student Association, and the National Association of Student Personnel Administrators.

The *Statement of Principles of Good Practice* is reviewed annually and revised to reflect new concerns for ethical admission practices and policies.

High schools, colleges, universities, other institutions and organizations, and individuals dedicated to the promotion of formal education believe in the dignity, the worth, and the potentialities of every human being. They cooperate in the development of programs and services in postsecondary counseling, admission, and financial aid to eliminate bias related to race, creed, gender, sexual orientation, age, political affiliation, national origin, and disabling conditions. Believing that institutions of learning are only as strong ultimately as their human resources, they look upon counseling individual students about their educational plans as a fundamental aspect of their responsibilities.

They support, therefore, the following *Statement of Principles of Good Practice* for members of the National Association of College Admission Counselors.

I. ADMISSION PROMOTION AND RECRUITMENT

A. College and University Members agree that they will:

1. Ensure that admission counselors are viewed as professional members of their institutions' staffs. As professionals, their compensation shall take the form of a fixed salary rather than commissions or bonuses based on the number of students recruited.

2. Be responsible for the development of publications, written communications, and presentations, i.e., college nights, college days, and college fairs, used for their institution's promotional and recruitment activity. They will:

   a) State clearly and precisely the requirements for secondary school preparation, admission tests, and transfer student admission.

   b) Include a current and accurate admission calendar. If the institution offers special admission options such as early admission, early action, early decision, or waiting list, the publication should define these programs and state deadline dates, notification dates, required deposits, refund policies, and the date when the candidates must reply. If students are placed on wait lists or alternate lists, the letter which notifies the students of the placement should provide a history that describes the number of students placed on the wait lists, the number offered admission, and the availability of financial aid and housing. Finally, if summer admission or mid-year admission is available, students should be made aware of the possibility in official communication from the institution.

   c) Give precise information about costs, opportunities, and requirements for all types of financial aid, and state the general relationship between admission practices and policies and financial aid practices and policies.

   d) Describe in detail any special programs, including overseas study, credit by examination, or advanced placement.

   e) Include pictures and descriptions of the campus and community which are current and realistic.

   f) Provide accurate information about the opportunities/selection for institutional housing, deadline dates for housing deposits, housing deposit refunds, and describe policies for renewal availability of such institutional housing.

   g) Provide accurate and specific descriptions of any special programs or support services available to students with handicapping conditions, learning disabilities, and/or other special needs.

   h) Identify the source and year of study when institutional publications and/or media communications cite published ratings of academic programs, academic rigor or reputations, or athletic rankings.

   i) Indicate that the institution is a NACAC member and has endorsed the principles contained in this *Statement*.

3. Exercise appropriate responsibility for all people whom the institution involves in admission, promotional, and recruitment activities (including their alumni, coaches, students, faculty, and other institutional representatives) and educate them about the principles outlined in this *Statement*. Colleges and universities which engage the services of admission management or consulting firms shall be responsible for assuring that such firms adhere to this *Statement*.

4. Speak forthrightly, accurately, and comprehensively in presenting their institutions to counseling personnel, prospective students, and their families. They will:

   a) State clearly the admission requirements of their institutions, and inform students and counselors about changed admission requirements so that candidates will not be adversely affected in the admission process.

   b) State clearly all deadlines for application, notification, housing, and candidates' reply requirements for both admission and financial aid.

   c) Furnish data describing the currently enrolled freshman class. Describe in published profiles all members of the enrolling freshman class. Subgroups within the profile may be presented separately because of their unique character or special circumstances.

   d) Not use disparaging comparisons of secondary or postsecondary institutions.

   e) Provide accurate information about the use/role of standardized testing in their institutions' admission process.

5. Not use unprofessional promotional tactics by admission counselors and other institutional representatives. They will:

   a) Not offer or pay a per capita premium to any individual or agency for the recruitment or enrollment of students.

   b) Not contract with placement services which require a fee from the institution for each student enrolled.

   c) Not encourage students to transfer if they have shown no interest in doing so.

   d) Not compromise the goals and principles of this *Statement*.

6. Refrain from recruiting students who are enrolled, registered, or have declared their intent or submitted contractual deposit with other institutions unless the students initiate inquiries themselves or unless cooperation is sought from institutions which provide transfer programs.

7. Understand the nature and intent of all admission referral services utilized by their institutions (including their alumni, coaches, students, faculty, and other institutional representatives) and seek to ensure the validity/professional competency of such services.

B. Secondary School Members agree that they will:

1. Provide a program of counseling which introduces a broad range of postsecondary opportunities to students.

2. Encourage students and their families to take the initiative in learning about colleges and universities.

3. Invite college and university representatives to assist in counseling candidates and their families about college opportunities.

4. Not use disparaging comparisons of secondary or postsecondary institutions.

5. Establish a policy with respect to secondary school representatives for the release of students' names. Any policy which authorizes the release of students' names should provide that the release be made only with the students' permission consistent with state law and local regulations. That permission may be a general consent to any release of the students' names. Secondary school representatives shall, in releasing students' names, be sensitive to the students' academic, athletic, or other abilities.

6. Refuse any reward or remuneration from a college, university, or private counseling service for placement of their school's students.

7. Be responsible for all personnel who may become involved in counseling students on postsecondary options available and educate them about the principles

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in this *Statement*.

8. Be responsible for compliance with state/federal regulations with respect to the students' rights to privacy.

9. Not guarantee specific college placement.

10. Give precise information about the opportunities and requirements for all types of financial aid.

11. Indicate that the institution is a NACAC member and has endorsed the principles in this *Statement*.

C. Independent Counselor Members agree that they will:

1. Provide a program of counseling which introduces a broad range of postsecondary opportunities to students.

2. Encourage students and their families to take initiative in learning about colleges and universities.

3. Invite college and university representatives to assist in counseling candidates and their families about college opportunities.

4. Not use disparaging comparisons of secondary or postsecondary institutions.

5. Refuse unethical or unprofessional requests (e.g., for names of top students, names of athletes) from college or university representatives (e.g., alumni, coaches, or other agencies or organizations).

6. Refuse any reward or remuneration from a college, university, agency, or organization for placement of their clients.

7. Be responsible for all personnel who may become involved in counseling students on postsecondary options and educate them about the principles in this *Statement*.

8. Be responsible for compliance with state/ federal regulations with respect to students' rights to privacy.

9. Not guarantee specific college placement.

10. Give precise information about opportunities and requirements for all types of financial aid.

11. Provide advertisements or promotional materials which are truthful and do not include any false, misleading, or exaggerated claims with respect to services offered.

12. Communicate with the school counselor about students whenever and wherever possible.

13. Consider donating time to students who need the services of an independent counselor but who are unable to pay.

14. Indicate that the NACAC member has endorsed the principles in this *Statement*.

D. All other members providing college admission counseling services to students agree to adhere to the principles in this Statement.

E. College fairs, clearinghouses, and matching services that provide liaison between colleges/ universities and students shall be considered a positive part of the admission process if they effectively supplement other secondary school guidance activities and adhere to this Statement.

II. ADMISSION PROCEDURES

A. College and University Members agree that they will:

1. Accept full responsibility for admission decisions and for proper notification of those decisions to candidates and, when possible, to their secondary schools.

2. Receive information about candidates in confidence and respect completely, consistent with federal, state, or local regulations, the confidential nature of such data.

3. Notify high school personnel when the institution's admission selection committee includes students.

4. Not apply newly revised requirements to the disadvantage of a candidate whose secondary school courses were established in accordance with earlier requirements.

5. Notify candidates as soon as possible if they are clearly inadmissible.

6. Admit candidates on the basis of academic and personal criteria rather than financial need. This provision shall not apply to foreign nationals ineligible for federal student assistance.

7. Not require candidates or the secondary schools to indicate the order of the candidates' college or university preferences, except under early decision plans.

8. Not make offers of admission to students who have not submitted admission applications.

9. Permit first year candidates for fall admission to choose, without penalty, among offers of admission and financial aid until May 1. Colleges that solicit commitments to offers of admission, financial assistance, and/or housing prior to May 1 may do so provided those offers include a clear statement that written requests for extensions until May 1 will be granted, and that such requests will not jeopardize a student's status for housing and/or financial aid. Candidates admitted under an early decision program are a recognized exception to this provision.

10. If necessary, establish a wait list that:
   a) Is of reasonable length.

   b) Is maintained for the shortest possible period and in no case later than August 1.

   c) Does not require a deposit.

11. Establish wait list procedures that ensure:
   a) Students on the wait list will not be asked for a commitment to enroll prior to receiving an official written offer of admission.

   b) Candidates for financial aid will receive financial aid decisions at the time of admission.

12. State clearly the admission procedures for transfer students by informing candidates of deadlines, documents required, courses accepted, and course equivalency and other relevant policies.

13. Inform students and counselors about new or changed requirements which may adversely affect candidates who have met all required deadlines, deposits, and commitments according to the students' original notification from the institution.

14. Exercise their responsibility to the entire educational community.

15. Accept, for the purposes of documenting student academic records, only official transcripts in the admission or registration process which come directly from the counseling, guidance, or registrar's offices of the institution(s) the candidate attends or has attended or from other appropriate agencies.

B. Secondary School Members agree that they will:

1. Provide, in a timely manner, for colleges and universities accurate, legible, and complete official transcripts for the school's candidates.

2. Provide colleges and universities with a description of the school's marking system which may include the rank in class and/or grade point average.

3. Provide a school profile which will:

   a) Clearly describe special curricular opportunities (e.g., honors, Advanced Placement courses, seminars) and a comprehensive listing of all courses with an explanation of unusual abbreviations and any information required for proper understanding.

   b) Be a true and accurate statement with regard to test score information for all students in the represented class cohort group who participated in college admission testing.

4. Provide accurate descriptions of the candidates' personal qualities which are relevant to the admission process.

5. Report any significant changes in candidates' academic status or qualifications between the time of recommendation and graduation, consistent with federal, state, or local regulations.

6. Urge candidates to understand and discharge their responsibilities in the admission process. Candidates will:

   a) Comply with requests for additional information in a timely manner.

   b) Respond to institutional deadlines and refrain from stockpiling acceptances.

   c) Refrain from submitting multiple deposits or making multiple commitments.

   d) Respond to institutional deadlines on housing reservations, financial aid, health records, and course prescheduling, where all or any of these are applicable.

7. Not reveal, unless authorized, candidates' college or university preferences.

8. Advise students and their families not to sign any contractual agreement with an institution without examining the provisions of the contract.

9. Exercise their responsibility to the entire educational community.

10. Counsel students and their families to file a reasonable number of applications.

11. Counsel students and their families to notify other institutions when they have accepted an admission offer.

12. Encourage students to be the sole authors of their applications and essays, and to counsel against inappropriate assistance on the part of others.

C. Independent Counselor Members agree that they will:

1. Urge candidates to recognize and discharge their responsibilities in the admission process. Candidates will:

a) Comply with requests for additional information in a timely manner.

b) Respond to institutional deadlines and refrain from stockpiling acceptances.

c) Refrain from submitting multiple deposits or making multiple commitments.

d) Respond to institutional deadlines on housing reservations, financial aid, health records, and course prescheduling, where all or any of these are applicable.

2. Not reveal, unless authorized, candidates' college or university preferences.

3. Advise students and their families not to sign any contractual agreement with an institution without examining the provisions of the contract.

4. Exercise their responsibility to the entire educational community.

5. Counsel students and their families to file a reasonable number of applications.

6. Follow the process recommended by the candidates' high school for filing college applications.

7. Encourage students to be the sole authors of their applications and essays, and to counsel against inappropriate assistance on the part of others.

D. All other members providing college admission counseling services to students agree to adhere to the principles in this Statement.

III. STANDARDIZED COLLEGE ADMISSION TESTING

Members accept the principle that fairness in testing practices should govern all institutional policies. Because test results can never be a precise measurement of human potential, members commit themselves to practices that eliminate bias of any kind, provide equal access, and consider tests as only one measure in admission/counseling practices.

A. College and University Members agree that they will:

1. Use test scores and related data discretely and for purposes that are appropriate and validated.

2. Provide prospective students with accurate and complete information about the use of test scores in the admission process.

3. Refrain from using minimum test scores as the sole criterion for admission, thereby denying certain students because of small differences in scores.

4. Use test scores in conjunction with other data such as school record, recommendations, and other relevant information in making decisions.

5. Encourage the use of all pertinent information, not just test scores, as appropriate measures of institutional rank or admission selectivity.

6. Conduct institutional research to inquire into the most appropriate use of tests for admission decisions.

7. Refrain from using tests, as they pertain to the admission of students and to the packaging of financial aid, to discriminate against students whose scores may reflect socioeconomic status, race, gender, disabling conditions, and/or ethnic background.

8. Educate staff in understanding the concepts of test measurement, test interpretation, and test use so they may make informed admission decisions from the test data.

9. Counsel students to take only a reasonable number of tests and only those necessary for their postsecondary plans.

10. Maintain the confidentiality of test scores.

11. Publicize clearly policies relating to placement by tests, awarding of credit, and other policies based on test results.

12. Refrain from the public reporting of mean and median admission test scores and instead, depending upon the requested information, report scores by any or all of the following methods:

a) Middle 50 percent of the scores of all first-year applicants.

b) Middle 50 percent of the scores of all first-year students admitted.

c) Middle 50 percent of the scores of all first-year students enrolled.

d) Appropriate score bands for all first year students applied, admitted, and enrolled.

Furthermore, members agree that, when using the above guidelines in their published profiles, they will report first on all first-year admitted or enrolled students, or both, including special subgroups (e.g., athletes, nonnative speakers, etc.) and then, if they wish, may present separately the score characteristics of special subgroup populations. Universities with more than one undergraduate division may report first by division and then by special subgroups within divisions. Clear explanations of who is included in the subgroup population should be made. Those institutions that do not require tests or for which tests are optional will only report scores if the institution clearly and emphatically states the limits of the group being reported.

B. Secondary School Members agree that they will:

1. Inform students about what tests they need for admission, where they may take them, and how to interpret the results in their own contexts.

2. Be sensitive to the limitations of standardized tests and counsel students with these limitations in mind.

3. Inform students about the use and validity of test scores, both for admission and as measures of potential and ability.

4. Counsel students and families on how test scores may be used in the admission process by colleges and universities.

5. Counsel students to take only a reasonable number of those tests necessary for their postsecondary plans, without regard to the impact the test results may have on the school profile report.

6. Seek to alleviate the anxiety associated with tests by counseling students carefully and by expressing concern for the whole student, not just the college placement facet.

7. Counsel students and families about data, other than test results, that may be submitted as part of the application process.

8. Counsel students about test preparation programs and inform them about alternative programs and/or approaches.

9. Release and report test scores only with students' consent.

10. Avoid comparing colleges/universities solely on the basis of test scores.

11. Avoid undue emphasis on test scores as a measure of students' potential and ability when representing students to colleges and universities.

12. Work with other school officials and other groups to keep test results confidential and in perspective.

13. Refrain from the public reporting of mean and median admission test scores and instead, report scores by either or both of the following:

a) Middle 50 percent of *all* students enrolled.

b) Appropriate score bands of *all* students enrolled.

Furthermore, members agree that when using the above guidelines in school profiles, they will report on *all* students within a discrete class (e.g., freshman, sophomore, junior, senior) who participated in college admission testing.

C. Independent Counselor Members agree that they will:

1. Inform students about what tests they need for admission, where they may take them, and how to interpret the results in their own contexts.

2. Be sensitive to the limitations of standardized tests and counsel students with these limitations in mind.

3. Inform students about the use and validity of test scores, both for admission and as measures of potential and ability.

4. Counsel students and families on how test scores may be used in the admission process by colleges and universities.

5. Counsel students to take only a reasonable number of tests and only those necessary for their postsecondary plans.

6. Seek to alleviate the anxiety associated with tests by counseling students carefully and by expressing concern for the whole student, not just the college placement facet.

7. Counsel students and families about data, other than test results, that may be submitted as part of the application process.

8. Counsel students about test preparation programs and inform them about alternative programs and/or approaches.

9. Release and report test scores only with students' consent.

10. Avoid comparing colleges/universities solely on the basis of test scores.

11. Avoid undue emphasis on test scores as a measure of students' potential and ability when representing students to colleges and universities.

12. Work with other school officials and other groups to keep test results confidential and in perspective.

***D. All other members providing college admission counseling and/or testing services to students agree to adhere to the principles in this* Statement.**

IV. FINANCIAL AID

Member institutions are encouraged to support the principle of distributing financial aid funds on the basis of proven financial need. No-need scholarship funds should not in any way reduce the total amount of funds available to students with demonstrated need.

A. College and University Members agree that they will:

1. Offer financial aid to candidates in the form of scholarships, grants, loans, or employment, either alone or in combination.

2. Strive, through their publications and communications, to provide students, families, and schools with factual information about their institutions' costs, and opportunities, programs, and practices.

3. View financial aid from colleges, universities, and other sources as supplementary to the efforts of students' families when the students are not self-supporting.

4. Employ methods in determining the financial contribution of candidates' families, which assess ability to pay in a consistent and equitable manner, such as those developed by the College Scholarship Service, the American College Testing Program, and other needs analysis services.

5. State clearly to candidates for admission the total yearly cost of attending the institutions, and report to students seeking financial aid an estimate, after documentation, of the amount of aid which may be available to them.

6. Permit first-year candidates for fall admission to choose, without penalty, among offers of financial aid until May 1. Colleges that solicit commitments to offers of need-based and/or merit-based financial aid prior to May 1 may do so provided those offers include a clear statement that written requests for extensions until May 1 will be granted, and that such requests will not jeopardize a student's status for housing and/or financial aid. Candidates admitted under an early decision program are a recognized exception to this provision.

7. State clearly policies on renewal of financial aid.

8. Not publicly announce the amount of need-based aid awarded to candidates; however, amounts of no-need scholarship awards may be a matter of public record.

9. Not use financial need as a consideration in selecting students. This provision shall not apply to foreign nationals ineligible for federal student assistance.

10. Notify accepted aid applicants of institutional financial aid decisions before the date by which a reply must be made to the offer of admission, assuming all forms are in on time.

11. Meet, to the extent possible within the institutions' capabilities, the full need of accepted students.

12. Make awards to students who apply for renewal of financial aid by reviewing their current financial circumstances and establishing the amount of aid needed.

13. Not make financial aid awards to students who have committed to attend other institutions unless the students initiate such inquiries.

14. Not make financial aid awards to students who have not submitted admission applications.

15. Refrain from withholding financial aid awards until the awards from the students' other college choices have been announced.

B. Secondary School Members agree that they will:

1. Refrain, in public announcements, from giving the amounts of financial aid received by individual students; however, amounts of no-need scholarship awards may be a matter of public record.

2. Advise students who have been awarded financial aid by non-collegiate sources that they have the responsibility to notify the college of the type and amount of such outside aid.

3. Provide adequate opportunity within the school for all able students to receive special recognition for their accomplishments, thus making it unnecessary for colleges and universities to provide such honorary recognition through their financial aid programs.

4. Not guarantee financial aid or scholarship awards.

C. Independent Counselor Members agree that they will:

1. Refrain, in public announcements, from giving the amounts of financial aid received by individual students; however, amounts of no-need scholarship awards may be a matter of public record.

2. Advise students who have been awarded financial aid by noncollegiate sources that they have the responsibility to notify the college of the type and amount of such outside aid.

3. Not guarantee financial aid or scholarship awards.

***D. All other members providing college admission counseling services to students agree to adhere to the principles in this* Statement.**

V. ADVANCED STANDING STUDENTS AND THE AWARDING OF CREDIT

A. College and University Members agree that they will:

1. Design placement, credit, and exemption policies to augment educational placement opportunities, not to recruit students.

2. Evaluate student competency through the use of validated methods and techniques.

3. Define and publish in the institutions' preadmission information the policies and procedures for granting credit.

4. Evaluate previously earned credit, published by the admitting college or university, in a manner which ensures the integrity of academic standards as well as the principle of fairness to the students.

B. Secondary School Members agree that they will:

1. Alert students to the full implications of college and university placement, credit, and exemption policies with regard to their educational planning and goals.

2. Make students aware of the importance of accreditation.

3. Make students aware of the possibilities of earning credit through both nontraditional educational experiences and examinations and alternative methods of instruction.

C. Independent Counselor Members agree that they will:

1. Alert students to the full implications of college and university placement, credit, and exemption policies with regard to their educational planning and goals.

2. Make students aware of the importance of accreditation.

3. Make students aware of the possibilities of earning credit through both nontraditional educational experiences and examinations and alternative methods of instruction.

***D. All other members providing admission counseling services to students agree to adhere to the principles in this* Statement.**

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About the Authors

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Roger M. Swanson serves as associate vice president for student affairs at California Polytechnic State University at San Luis Obispo. He has responsibility for University Outreach Services (new student recruitment), Student Academic Services (academic support and retention programs), Financial Aid, Career Services, and Commencement, as well as publications, total quality management, and professional development for the Student Affairs Division.

Swanson's previous administrative positions at Cal Poly and Arizona State University include acting vice president for student affairs, associate vice president for academic affairs, and dean of admissions and financial aid.

Among his 40-plus professional publications and presentations is a book on college-level writing entitled *The Freshman Writes*. His consulting activities and positions in state and national professional organizations relate to recruitment, admissions, enrollment management, and leadership development. He has received the CASE Crystal Apple award for excellence in teaching.

He has earned three degrees in English literature from Illinois institutions: a B.A. (cum laude) from North Central College and an M.A. and Ph.D. from the University of Illinois.

Christine Kajikawa Wilkinson

Christine Kajikawa Wilkinson is the vice president for student affairs and associate professor in educational leadership and policy studies at Arizona State University. Departments reporting to her include Career Services, Counseling and Consultation, Educational Development, Memorial Student Union, Recreational Sports and Student Activities, Registrar, Residential Life and Student Development, Student Financial Assistance, Student Health Center, Student Life,

Student Publications, Undergraduate Admissions, Child Care Resources, and the University Club.

Wilkinson has been active in the field of enrollment services for a number of years and serves on the Board of Trustees for the American College Testing Program, is past president of the Pacific Association of Collegiate Registrars and Admissions Officers, and is on the Student Affairs Executive Council for the National Association of State Universities and Land Grant Colleges.

She was honored as an Outstanding Young Woman of America and has received the university's Award of Merit and the CASE Crystal Apple award for excellence in teaching.

Her educational background includes the following degrees: a B.A. in Education with distinction from ASU, an M.A. in Counseling Psychology from the University of California at Berkeley, and a Ph.D. in Higher Education Administration from ASU.

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